

Strategic Advisory Group

January 21, 2013

Jason P. Davis, County Chair
Members of the Volusia County Council
123 W. Indiana Avenue, Room 100
DeLand, FL 32720

Chair Davis and County Council Members,

Strategic Advisory Group is pleased to present this analysis of Volusia County Tourism. We have spoken or met with approximately 150 members of the community. The data included in this report has been extracted from information supplied to us from county and tourism representatives and various other primary and secondary sources. We have used sources that are deemed reliable but cannot guarantee their accuracy. We have conducted extensive research and want to thank the local businesses that participated.

We have enjoyed working with the county, the tourism authorities, and a wide variety of stakeholders. SAG is committed to support and give guidance related to the successful implementation of the recommendations included in this report.

If you have questions, please do not hesitate to call me at (831) 298-7215.

Very Truly Yours,



Daniel Fenton
Associate Principal
Strategic Advisory Group

cc: James T. Dinneen, County Manager

An analysis of Volusia County tourism marketing

(preliminary report)



*Presented to the Volusia County Council
by Strategic Advisory Group, Duluth, Georgia
Daniel Fenton, Lead Consultant
January 2013*

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Summary:

In February 2011, the Volusia County Council voted unanimously to hire a qualified consultant to conduct an independent analysis of countywide tourism and convention marketing efforts of the Volusia's tourism advertising authorities and the Ocean Center. On November 10, 2011 the County Council approved a contract with Strategic Advisory Group, Duluth, Georgia, to conduct the study. An overview of the study's goals, process and desired outcomes was presented at a public reception on January 10, 2012. Since then, hundreds of hours have been spent analyzing data, conducting research and receiving input from community leaders and stakeholders. The lead consultant on the project, Dan Fenton, has conducted interviews with more than 150 people and received communications from many others.

For further information go to: volusia.org and click on tourism and marketing study in the dropdown menu.

About Strategic Advisory Group

Strategic Advisory Group, Duluth, Georgia, has more than 20 years of tourism support within excess of \$1 billion in successful projects throughout the world. The firm's projects have included tourism funding and financing, market research, strategic planning and implementation. Its Florida clients include Miami Dade, Broward and Palm Beach counties and the cities of Tampa, Jacksonville and Sarasota. Jeff Sachs is the firm's Managing Partner. Dan Fenton is the firm's Project Executive. Support is provided by senior level partners from KPMG, Ernst and Young and Marriott.

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Executive summary

Strategic Advisory Group (SAG) has completed a study of many aspects of Volusia County tourism. The study engaged approximately 150 community members and tourism stakeholders. The study includes an analysis of current visitors to Volusia County based on a sample size exceeding 70,000 visitors. In addition, research was conducted in similar Florida counties and competitive destinations to understand funding and practices.

The current state of the tourism industry in Volusia County presents many opportunities. The recommendations in this study create a platform that will transform an industry that is arguably the most important for the overall economic success of the county. A declining level of visitors in a slowly improving economy, coupled with a tourism experience that needs investment, was the impetus that led the Volusia County Council to commission this project. It will take a concerted effort and political and civic leadership to make some of the changes recommended in this report. However, some recommendations can be implemented almost immediately with little effort; some recommendations will take time and the will to make changes. It must be noted, Volusia's tourism lags behind many of its competitors. The successful implementation of the recommendations contained in this report will require a dedicated effort to manage the multiple initiatives.

The inclusive, county wide approach and direct involvement of the leadership of Volusia's three tourism advertising authorities has led to recommendations that take into account the broad spectrum of input coupled with SAG's understanding of industry best practices.

The community and stakeholders expressed some common concerns about the current state of tourism in Volusia County. These concerns include a lack of measurement and information designed to inform and encourage participation and support. SAG has recommended an approach to measurement and information that is achievable, understandable and consistent for the three tourism authorities.

The advantages and opportunities for collaboration with key partners throughout the county are presented in this report. This is another area of opportunity raised in the numerous meetings throughout this study. SAG recommends the County Council approve new requirements in the annual budgeting and marketing plan process designed to encourage each authority to detail their respective approach to collaboration. The current level of disengagement is a threat to the long-term success of the tourism industry.

SAG has outlined a new approach to gaining additional support in the governance process for the advertising authorities. The importance of the role of the governing bodies cannot be understated. The recent challenges that have occurred, and the importance of their role in overseeing overall direction, leads to a need to rethink the current appointment process. A common theme in the discussions

throughout the county is the condition of the tourism product in Volusia County. A focal point of this is the state of the visitor experience in Daytona Beach. The importance of a proactive plan for tourism product development encompasses the entire county. SAG met with the community and internal leadership of the regional economic development organizations. These discussions included the importance of the tourism industry and its development. SAG recommends the creation of a Tourism Product Development Task Force comprised of the leadership of these organizations. This will position key resources to determine the best strategies to stimulate private and public investment in one of the largest and most important industries for Volusia County.

The stakeholder community expressed interest in gaining a clearer understanding of how the current tourism marketing efforts could be more focused and measurable. SAG has conducted research that has demonstrates how to use data to refine the direction of future marketing efforts. The current trends for how prospective visitors are getting information and purchasing travel experiences have influenced SAG's recommendation to focus more marketing efforts on reaching targeted markets directly. This also creates an opportunity to measure the success of marketing initiatives.

Another advantage of creating experiences and marketing them directly is exposing potential visitors to a wide variety of Volusia County experiences. These advantages are described in this report.

The structure of three independent advertising authorities was reviewed in this study. SAG met with the executive directors and staffs of each to understand their operations. The concept of a singular tourism marketing organization warrants ongoing consideration. The current structure of three tourism authorities promotes regional thinking as opposed to maximizing the county's overall tourism strengths. SAG has proposed a "shared service model" which leaves intact the current strategic decision making process and governing bodies. This model will create a vastly improved support system in a wide variety of areas that will benefit all three regions and enhanced communications. These services include a centralized accounting and finance operation, support in developing online content, uniform reporting and measurement, common software and a state-of-the-art fulfillment plan.

SAG has worked extensively with the Ocean Center's leadership, stakeholders and the Daytona Convention and Visitors Bureau in determining an effective course for future sales and marketing efforts. There is duplication of efforts and a lack of synergy that is hindering overall results. The current number of large or "citywide" groups that are booked in the future is below what either team or the local stakeholders believe is achievable. SAG has studied the sales and marketing activities and recommends new functionality that includes:

1. Governance buy in and accountability
2. A revised booking policy that reflects agreed upon priorities
3. A unified sales team
4. A singular marketing plan
5. Comprehensive market prioritization

6. A sales deployment plan
7. Maximization of all marketing channels
8. Holistic goal setting with a new inclusive process
9. Common incentive plan
10. Sales performance plan
11. Future (PACE) reporting plan

The implementation of the recommended functionality will create a structure that is designed to increase the overall impact of the Ocean Center.

From a marketing perspective, SAG has evaluated the opportunity that exists in further use of the Daytona brand. The word “Daytona” has been used in many different consumer products and is the name of a famous beach and the “Super Bowl of Racing”. These factors warrant serious consideration in future marketing decisions. SAG recommends further study of this opportunity.

Special events are an important strategy in effective tourism planning. The Daytona 500 is an annual signature event. The Daytona 500 recently is ranked as the fifth highest revenue event in the world by Forbes Magazine. In the course of this study, SAG received feedback related to the value of other special events, such as Bike Week. SAG recommends common metrics be considered when evaluating the value and importance of an event from a tourism perspective. These include economic impact and quality of life considerations. SAG recommends all tourism marketing plans include an event section that outlines proposed investment and qualifies events in terms of tourism and community benefit.

Another tourism opportunity for Volusia County is to bring in more sporting events to the wide spectrum of sporting facilities. SAG recommends the creation of a Volusia sports commission that would be supported by many community partners and be focused on increasing the number of sporting events taking place in Volusia County. This includes shifting current resources and the creation of a plan with measurable outcomes.

SAG studied the funding sources and uses of seven counties and destinations. SAG evaluated the current marketing resources in comparison to the number of overnight visitors. Volusia County is the lowest of those studies. Volusia County ranks higher in terms of marketing dollars in comparison to all lodging units. SAG recommends that opportunities to increase marketing funds be reviewed including industry-driven mechanisms.

The County Council and the tourism community have an opportunity to support and oversee a transformation of the most important industry in Volusia County. There are measures related to the reporting and accountability of the advertising authorities that can be implemented immediately. SAG recommends the County Council support a new direction with implementation oversight for the Ocean Center and other complex initiatives. This is an opportunity for business and community leaders in conjunction with elected officials to join together and transform the tourism industry in Volusia County.

Introduction

Strategic Advisory Group (SAG) is pleased to present the following findings and recommendations to improve current practices for Volusia County tourism. SAG has spent several months meeting with members of the community and tourism stakeholders. SAG has held community meetings and one-on-one discussions to understand various perspectives and gain valuable background on tourism in Volusia County. SAG thanks the nearly 150 stakeholders who have met or attended meetings in support of this study. A list of participants is included in the appendix of this report.

SAG has obtained information from the County, the Advertising Authorities, regional counties and destinations and directly from local businesses for the PRIZM analysis. This information has been used in determining current activities and trends in the tourism industry.

SAG also worked closely with tourism organizations throughout this process in gaining insight and information. SAG would like to thank the West Volusia Advertising Authority, the Southeast Volusia Advertising Authority, the Daytona Beach Convention and Visitors Bureau, the Ocean Center and the Volusia County Hotel/Motel Association for their support.

SAG would also like to thank the Community Services Department, which acted as the liaison to this study, for their consistent support.

The interviews and meetings SAG had one common theme:

Tourism is one of the most important industries in Volusia County.

The following is a quote from an economic development newsletter:

The value of tourism

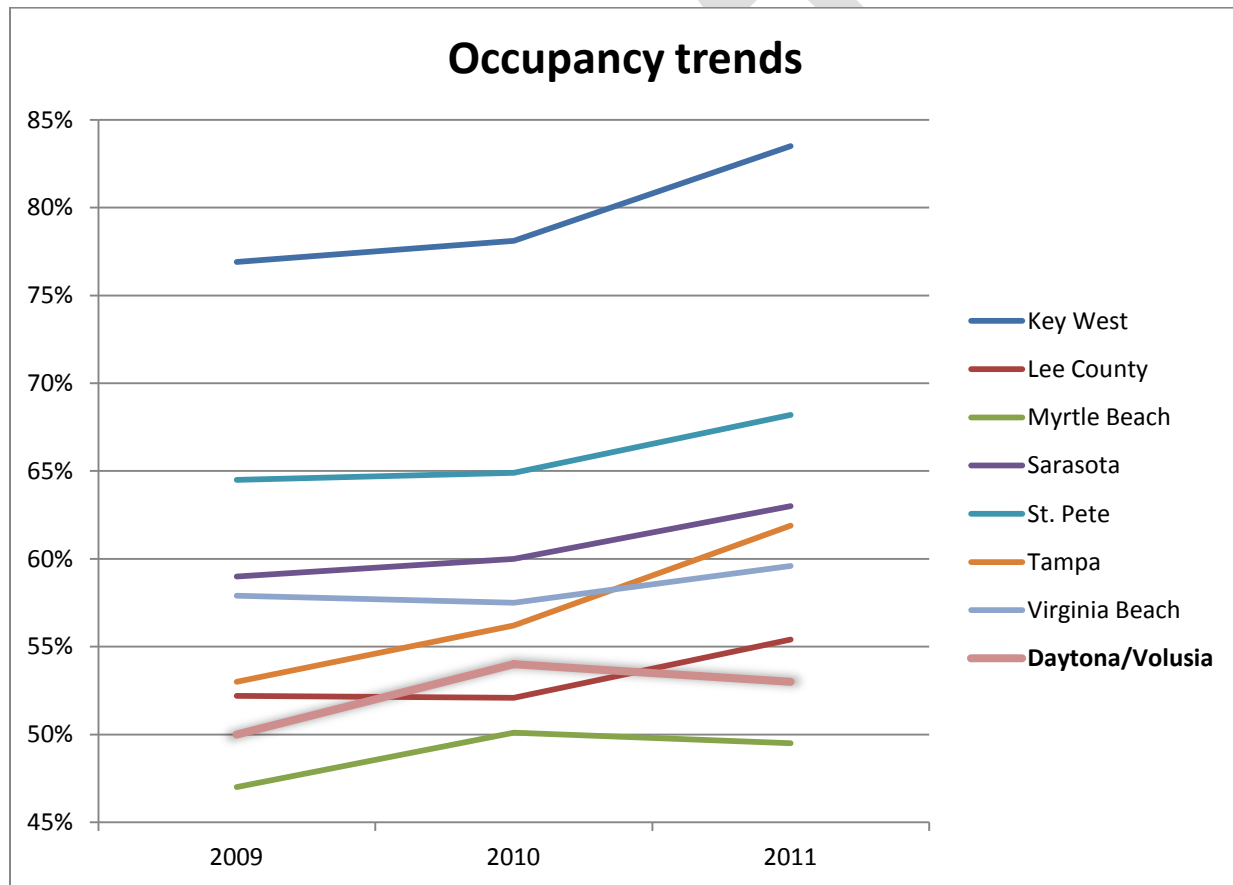
“While efforts to attract more business and industry to the region continue, tourism remains a formidable engine driving the economy statewide and regionally.”

This report will review the current state of the tourism industry, recommend improvement measures, analyze current funding, and create recommendations and an action plan.

Current state of the tourism industry

An important impetus for this study is the current trend in Volusia County tourism. The seven counties or competitive destinations that were studied have experienced an upward trend in occupancy, while Volusia County has experienced a decline over the past three years.

The following chart demonstrates the positive occupancy trends in other counties and cities as compared to the areas of declining occupancy in Volusia County.



Common themes of stakeholder interviews

The following are thoughts and input that were shared by many of the stakeholders that were interviewed.

Passion

The passion associated with the tourism industry in Volusia County is very high. This is a positive dynamic as stakeholders want to be informed and support the future direction. The high level of interest will support effective execution of the recommendations and provide a potential base of support for future funding models. There is an opportunity with an effective stakeholder communication plan to turn this passion into a positive support system for future marketing efforts.

Centralized marketing concerns

In many conversations, there was a common theme of a perceived challenge with creating a singular tourism agency for Volusia County. The common concern is that a centralized agency approach would move resources away from the unique areas of the county. Stakeholders from Southeast Volusia and West Volusia consistently conveyed their belief that the experiences in each region are vastly different and appeal to a unique audience.

Another concern raised is the sense that marketing resources would be shifted to support the Ocean Center. There is a consistent perception that the Ocean Center is underperforming based on its original targets and that a centralized approach would move marketing resources to focus on increasing group business.

Stakeholder communication is a must

A high percentage of the stakeholders who participated feel uninformed of current strategies and the overall results of tourism efforts. The stakeholders with the highest degree of understanding expressed concern over current marketing direction and are very interested in a potential communication plan that would inform them of current activity and results.

The concern over a lack of information was expressed from a broad base of tourism stakeholders and community partners. Examples of stakeholders include:

1. Hotel operators
2. Condominium managers
3. City elected officials
4. City management staff
5. Ethnic chambers
6. Attraction operators

Many stakeholders interviewed are very interested in the creation of a measurement plan. This would be shared with a broad base of stakeholders as a tool to increase understanding of success and current and future direction.

Condition of the tourism product

The stakeholders expressed concern over the current condition of the tourism “product,” notably the beach side of Daytona Beach. There were many types of concerns expressed. Examples include:

1. Condition of hotels
2. Condition of storefronts in high volume areas
3. Lack of attractive streetscape in key tourism areas

There is widespread concern that there is no “plan” for who is leading the effort and how these challenges can be improved. The issue of improvement in the tourism product was a top priority in most of the interviews.

Clarity of target customer

During SAG’s interviews, there was a wide range of opinions of who the “target customer” is for Volusia County. These ranged from a blue-collar family to a higher income visitor who might be interested in cultural tourism. Many stakeholders believe there are unique features throughout the county that attract unique visitors. It is very clear the work that has been performed to develop visitor profiles has not been widely communicated or understood as a current resource used to provide insight into the targeted leisure visitor for Daytona Beach. SAG has analyzed five years of visitor profile studies in key areas to support the overall research findings.

In the other areas of the county, this type of research doesn’t happen. Therefore, there is a complete dependence on stakeholder and governing board opinions in determining where to focus marketing efforts.

Lack of coordination – leverage

Another consistent theme throughout the interviews is that there is a lack of coordination with other key stakeholders, including municipalities and chambers of commerce. Following are observations and recommendations that relate to cities and chambers of commerce.

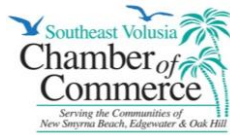
City leadership

SAG met with leadership from cities throughout the county. There is consistent interest in working collaboratively with the convention and visitors bureaus and tourism advertising authorities. There are many instances where expenditures are taking place and events are being created that could have been enhanced with tourism resources. Examples include budgets that were planned to promote districts or

events with no involvement of the respective tourism authority. City leaders expressed interest in collaborating on annual budgeting and promotions.

It is recommended the three authorities develop a process for including cities in the annual marketing and budgeting process with intent to collaborate and maximize the impact of collective resources. It is recommended that the County Council require a section in the advertising authorities' marketing plans that details collaborative efforts and synergy with strategic city partners.

Chambers of Commerce



SAG met with the chambers of commerce in DeLand, New Smyrna Beach, Port Orange/South Daytona, Daytona Beach and the Hispanic chamber in Deltona. It was clear from these discussions there are activities that would benefit if performed in conjunction with the tourism authorities. These include:

1. Independent event calendars
2. Independent hotel reservation systems
3. Independent tourism promotion campaigns
4. Support for tourism product development initiatives



The chambers of commerce should be strategic partners in the overall tourism plan for Volusia County. The chamber of commerce brand is well recognized and often a choice of travelers when learning about a destination. There is an opportunity to create a shared information plan between the chambers of commerce in the county and the tourism advertising authorities.

It is recommended that future marketing plans of the tourism advertising authorities contain a section on initiatives designed to create collaboration with the chambers of commerce.

Strengths, weaknesses, opportunities, threats (SWOT) analysis

STRENGTHS

Brand awareness – Daytona
The beaches
Community interest
Tourism’s positioning – lead industry
Multiple Volusia experiences

- Eco tourism
- Fishing
- Boating
- Cycling
- Birding

Interested, engaged county leadership
New leadership: Daytona Beach, SVAA
Interested partners: Speedway, Econ Dev.
History
Daytona 500

- Most watched auto race in the United States. Top 10 U.S. sporting event every year.
- Forbes’ fourth most valuable brand

Successful events
Value

WEAKNESSES

Marketing efforts need focus
Lack of research
Marketing decisions opinion, not research based
Lack of functional support for smaller authorities
Lack of leverage – collaboration with partners

- Chambers
- Cities
- Speedway

Economic development efforts not focused on tourism
Underperforming, poorly functioning group sales effort
Underperforming sports sales effort
Declining tourism product

THREATS

Divided polarized industry – community
Disengaged industry stakeholders
Group sales effort – noncollaborative
Governance model
Tourism’s positioning in economic development – attracting development
Product deterioration
No capital plan in cities or county
Number one industry – not treated as such

OPPORTUNITIES

Focused marketing efforts with measurable results

- Sell a larger experience than only the beach
- Different county experiences
- Create targeted marketing
- Enhance visitor experience – smaller enhancements

Larger capital investment plan

- Fold tourism into larger economic development efforts
- CEO Alliance, Team Volusia, County Econ Dev.

Maximizing sporting opportunities

- New countywide focus on attracting sporting events

Small wonders, streetscape, beach vendors
Seamless new approach to group sales
Centralize – leverage the brand
New partner involvement – collaboration

- Cities
- Chambers

The SWOT analysis points out the significant opportunity for future improvement in the effectiveness of Volusia County tourism. The items identified as strengths have the potential of continuing to differentiate Volusia County as a destination for many years to come. It is important there be a focus on maximizing the impact of the strengths and creating plans to improve the weaknesses and avoid the negative impact of potential threats. The following are the key considerations in each of the areas:

Strengths

The beaches

From New Smyrna Beach to Daytona Beach, the beaches of Volusia County are a strength. The beaches of Volusia County have affordability and accessibility as differentiating factors.

“The Super Bowl of Racing”

Volusia County is home to the Daytona 500, which ranks as the fifth most popular sporting event in the United States. There are more than 36.5 million unique viewers each year and an additional 500,000 spectators that come to Volusia every year. Forbes ranks the Daytona 500 as the fourth most valuable sporting brand in the world. This is a strength and an opportunity for Volusia County. It is recommended an annual plan be created to determine how the impact of this event can be maximized for the benefit of tourism. Additionally, nearly 70 percent of attendees come from outside of the state. It takes 100 hours of national television coverage to produce the event annually. Anecdotally, two of top 10 race markets have direct flights to Daytona Beach International Airport.

SAG met several times with the management of the Daytona 500 and Daytona International Speedway and it is clear they are willing partners who historically have not been asked how this world renowned event can be leveraged.

Brand equity – Daytona

The investment in the name Daytona has well exceeded \$1 billion over the past 50 years. There is a section of this report dedicated to the issue of leveraging the brand of Daytona.

Multifaceted tourism experience

The beaches of Volusia County are very popular tourist attractions and there should be a continuous strong focus on improving the quality of the “beach experience.” Another strength that can differentiate Volusia County as a destination is the opportunity that exists to enhance the visitor’s experience. This includes cycling, fishing, birding, eco tourism and many great events.

Number 1 industry

Tourism is the number one industry in terms of jobs and direct economic impact for Volusia County. This creates the opportunity to dedicate resources and community leadership to improving and increasing the impact of the tourism industry.

Weaknesses

Marketing efforts need focus

SAG reviewed the marketing plans of the three advertising authorities and met with internal staff members. As mentioned earlier, SAG met with over 150 community and tourism stakeholders. It is apparent there is a lack of consensus and focus in the marketing efforts. The recommendation to use a PRIZM analysis as a baseline research tool to guide future decisions is a start. However, the overall focus on targeted marketing with measurable results is an important new direction for the future.

Lack of leverage – partner collaboration

SAG met with city leadership throughout Volusia County. SAG also interviewed the chamber of commerce executive directors in DeLand, New Smyrna Beach, Port Orange, Deltona and Daytona Beach. In these discussions, it was clear there are opportunities for more effective collaboration and leveraging of marketing activities. Examples include:

1. Cross marketing of events
2. Collaboration on event calendars
3. Collaboration in marketing plan creation to maximize collective resources
4. Consistent involvement with staff or elected officials in the overall success of the authorities
i.e. committee participation, ex-officio board participation

Lack of unified tourism product development plan

There is no unified countywide plan to support the improvement of the tourism product, notably the beachside of Daytona Beach. There needs to be a concerted effort involving county, city, and business leadership to upgrade the beachside of Daytona Beach. This is a significant weakness in remaining competitive as a destination.

Opportunities

Volusia County has opportunities in the short and long term to make a significant positive impact on tourism.

Create and market specific Volusia County experiences

The buying patterns for travel have moved dramatically toward online purchasing. One research firm predicted that 40 percent of all travel purchased will be online by 2013. This trend creates the opportunity to market multiple Volusia County experiences to specific targeted audiences. SAG has spoken with online travel companies who provide the technical solution for fulfilling all aspects of a Volusia County travel package. This is an important future opportunity for Volusia County tourism.

Larger capital investment – economic development strategy

SAG met with members of the CEO Alliance, Team Volusia and Volusia County Economic Development. SAG has dedicated a section to the need to create a new economic development strategy for tourism product development.

Enhance sports sales and marketing

Volusia County has a wide variety of sporting facilities that have been organized recently on a central website – sportsvolusia.com. This is an effective tool that needs a concentrated sales and marketing effort. The potential new economic impact is substantial.

Creation of an integrated approach to group sales and marketing

The combination of the Ocean Center, Daytona Convention and Visitors Bureau, the hotel community and other venues is an opportunity to create an integrated approach to attracting groups to Volusia County.

Threats

There are threats in Volusia County that require attention. It is recommended proactive efforts be taken to minimize the impact of current threats.

Disengaged industry and community

The overall interest in the improvement of tourism effectiveness in SAG's meetings and discussions was very high. A very real current threat is the consistent indication of being uninformed and having no understanding of the effectiveness of current tourism initiatives. An aggressive and effective

communication plan featuring understandable, measurable results is critical for the long-term support and success of tourism.

An additional theme in SAG's meetings was the sense that it is going to be difficult to instill broad based confidence that is vital toward improved collaboration.

Governance model

Governance of an industry is ultimately the most important feature of long-term success. SAG has recommended a new process in the governance process designed to focus on key skill sets and knowledge base needed to effectively oversee Volusia's number one industry. A governance model that is designed to encourage the participation of the "thought leaders" in the tourism industry and the broader community will be pivotal for long-term advancement.

Product deterioration

Without resources – leadership and economic – the overall tourism experience in Volusia County will decline. An overall collaborative strategy is needed.

Improvement Measures

Governance

Strategic Advisory Group met with members of the Volusia County Council, the tourism advertising authority boards and the Daytona Beach Convention and Visitors Bureau board. These discussions were focused on many topics including governance. The process that creates the oversight and input for tourism is a critical part of overall success.

Currently, members of the tourism advertising authority boards are nominated individually by members of the Volusia County Council. It is important to note the three advertising authority boards are fiduciary in nature and provide the direct supervisions of the executive directors and CEO. The bylaws of the three authorities have the following language that has guided the appointment process:

The authority boards shall consist of 11 (7) members who shall be selected by a majority vote of the County Council from persons involved in the tourism and lodging industries and doing business in the Halifax, Southeast Volusia and West Volusia areas.

There isn't an overall suggestion that members should come from the tourism industry except that there is a minimum requirement of three tourism industry members.

Another aspect of the current process is that each County Council member is asked to submit individual nominees to the rest of the County Council for approval. This creates a scenario where those community members that are interested in serving will apply and be nominated by a particular County Council member. It then is up to the County Council member to make a recommendation based on the applications received.

Principle role of governance

The principal role of the authority board members, as representatives of tourism stakeholders and the Volusia County Council, is to oversee the function of the authority and ensure that it operates in the best interests of all stakeholders.

Given the complexity of the tourism community this is no simple or straightforward task. The challenge in the current scenario is that each individual County Council member is asked to recommend potential board members under guidelines that are very broad. The County Council members do not receive the

benefit of an industry-driven nominating process designed to fill specific professional needs for each authority.

The following is the description of board members for the United States Travel and Tourism Advisory Board:

The board shall consist of no more than 32 members appointed by the secretary. Members shall represent companies and organizations in the travel and tourism sector from a broad range of products and services, company sizes, and geographic locations and shall be drawn from large, medium, and small travel and tourism companies, private-sector organizations involved in the export of travel and tourism-related products and services, and other tourism-related entities.

This description provides more clarity in the background of potential board members. The benefit of more defined requirements for board members is the ability to create governing bodies made up of industry leaders who can provide very direct support and guidance to the respective staffs of the three authorities.

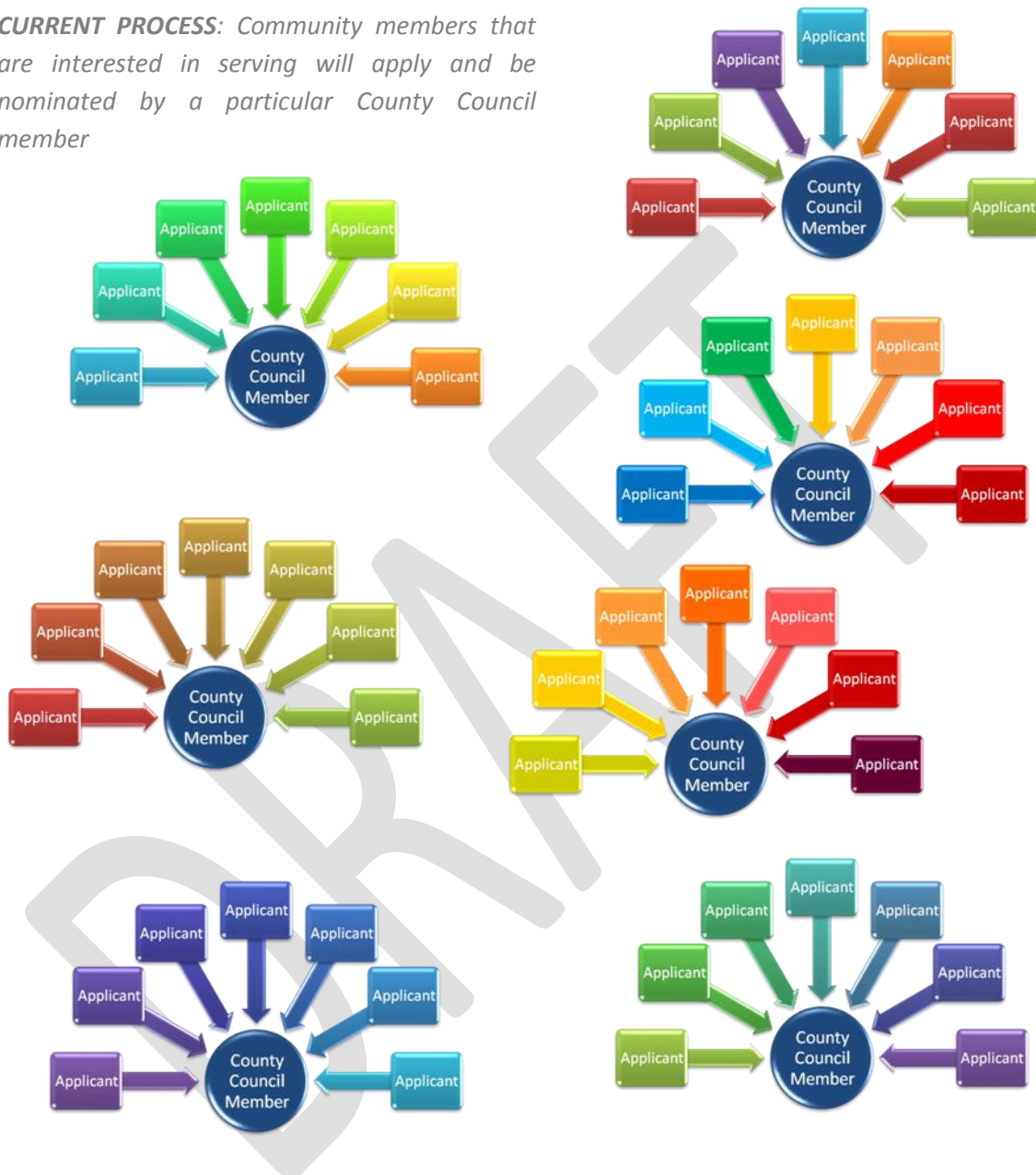
Industry-driven nominating process

The benefit of creating an industry-driven nominating process is to give the County Council members support and expertise in the selection of future advertising authority board members. It is recommended that further definition be created for the desired background of future board members. This background will include industry experience, potential key industry sectors and professional areas of focus. This does not preclude the opportunity for board nominations to come from the broader community if deemed strategically important.

In conjunction with this, it is recommended that an industry-driven nominating process is instituted to support the County Council in the selection of tourism board members. Each of the three tourism advertising authority boards would create nominating committees made up of current board members and interested tourism industry participants. These committees would present their recommendations to the County Council annually. The County Council would review the nominees and take action accordingly.

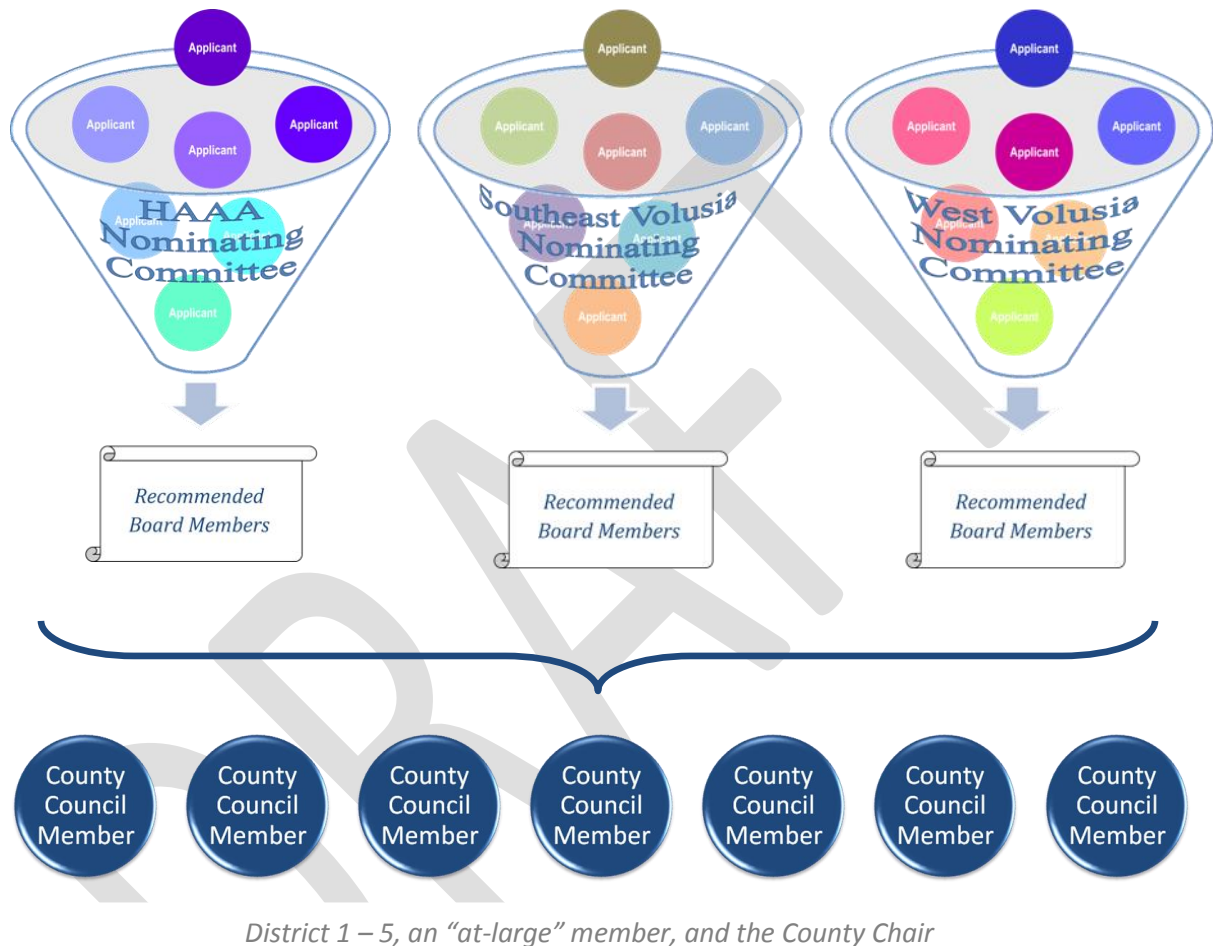
The recommended process does not change the overall authority of the County Council in the appointment of tourism authority board members. The importance of creating a governance model designed to provide strategic oversight and support of the respective advertising authorities cannot be understated. This is a critical part of the foundation of a successful tourism industry.

CURRENT PROCESS: Community members that are interested in serving will apply and be nominated by a particular County Council member



Districts 1 – 5, an “at-large” member and the County Chair

PROPOSED PROCESS: Nominating committees vet applicants to present to the County Council



Conclusion

The overall governance of the tourism industry is a vital issue for long-term success. The evolution of the nominating process will have a sustainable positive long-term effect on the tourism industry. The implementation of a new process designed to focus on important skill sets with support of the tourism industry is a critical enhancement for the future.

Economic development – an opportunity for tourism product development

SAG met with representatives from Team Volusia, the Volusia County Economic Development Division and the CEO Business Alliance. The meetings were held to understand perspectives on tourism and how tourism is positioned within the respective organizations.

The meetings revealed an understanding of the value of tourism for Volusia County. There is acknowledgment that tourism is the number one industry for the county. Further review determined that tourism product development is not a high priority as listed in the collective materials and websites.

The Team Volusia website lists “high impact” industries in the section on potential financial incentives. Tourism is not listed as one of these industries and there is no section for tourism investment. The enhanced site selection area had one potential hotel opportunity. The video on the CEO Alliance website depicts the value of locating a business in Volusia County with no mention or visual directed at tourism investment. The Volusia County website mentions tourism as an industry, but doesn’t promote the opportunity to invest.

The current challenges with the tourism product require a collaborative effort. This effort can be impactful in all aspects of the future Volusia County tourism experience. The deteriorating condition of key tourism areas and the lack of private investment will add greatly to the challenge of increasing the impact of tourism in the future.

Public/private partnerships – an important strategy

SAG is involved in large scale public/private hotel projects in Miami, Houston, Salt Lake City, Portland and Columbus. The common approach in each of these destinations is to gain public support including tourism stakeholders and local business leaders. Once the support is solidified, the potential developers are contacted to ensure the process encourages participation. In the cases of Miami and Houston, a majority of the top hospitality developers participated in the process. It is recommended that the newly formed task force create a process to analyze and create a proactive plan for attracting hotel development that will create a significant economic return on investment.



Houston recently approved public private Headquarter Hotel



Columbus, Ohio, publicly financed Headquarter hotel opened November 2012

Tourism industries – encourage investment

The leaders of the economic development organizations in Volusia County agree there is need for a collective effort on prioritizing and recruiting key partners to support the development of Volusia County's tourism product. These industries would include:

1. Hotels and resorts
2. Attractions

3. Entertainment
4. Restaurant
5. Retail

It is recommended that a Tourism Product Development Task Force is created that is supported by the three regional economic development organizations to stimulate large private or public/private investment.



The development of a functional task force with a focused plan creates opportunities for private investment in the tourism industry and is an important step for the future of Volusia County tourism. The task force would report quarterly on the activities related to tourism product development.

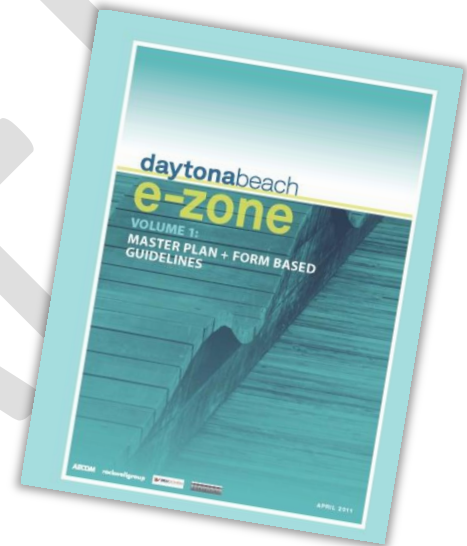
Case study: Daytona Beach E-Zone



SAG reviewed the E-Zone Master Plan that was supported by the City of Daytona Beach. The report lays out a comprehensive plan for the evolution of a key tourism area in Daytona Beach. SAG has not studied each of the recommendations in depth. However, the plan encompasses many key industries and attributes of improving an important tourism product for Volusia County.

The implementation plan recommends the formation of an advisory board and recommends involvement of Volusia County in determining potential resources to move the overall plan forward.

SAG would recommend the involvement of the proposed Tourism Product Development Task Force in determining strategies to encourage future private investment. The large-scale recommendations presented will require broad-based involvement designed to encourage investment.



Shared service model

It is recommended that a “shared service” model is incorporated to increase the effectiveness of the three tourism authorities. SAG met with internal leaders and board members of the three advertising authorities and participated in board meetings at SVAA and WVAA. It became clear there is an opportunity to create a model that would provide important support to the SVAA and WVAA and use the combined resources of all three authorities to increase overall tourism results.

Another important benefit of this recommended model is the centralized support in all of the administrative areas, including finance.

The proposed model maintains the funding levels that are dedicated to the three authorities and maintains the three governing boards. The decision-making process related to marketing direction and priorities would remain with the respective boards of directors.

It is recommended that a shared service model be instituted for a year and then a determination be made related to any reallocation of funding to cover expenses.

The services that would be shared would include:

Online support/shared content

It is recommended that the three authorities house all available online content on a common server. This will create the opportunity to use and strategize on how to maximize countywide information within the three web portals. A content management plan would ensure that all relevant information is shown on all three web portals.

SAG also recommends a common web development partner be engaged to support the online initiatives of the three authorities.

Experience/package selling support and fulfillment

It is recommended that technology and creative support be provided to all advertising authorities to improve the execution of experience or package sales. This is in support of the overall marketing recommendation to pursue more targeted “one-to-one” marketing. SAG worked with SVAA and WVAA on package development and marketing. The need for technology support was clear in developing these programs.

One example of this would be to use one online reservation and package platform to create the opportunity to sell effectively and fulfill future promotions. A singular platform and technology provider would create an opportunity for the three authorities to have automated fulfillment and focus efforts on driving awareness of their offerings.

Creative services

It is recommended that a common resource be used to produce ongoing creative pieces. The purpose is not to create a common look and feel, but to create a resource to maintain a very high level of quality for the three authorities.

Leverage media buying

It is recommended that annual advertising media buying be done collaboratively to maximize “buying power” of the combined resources. This also is not designed to centrally direct the decisions related to the most effective advertising media for each authority.

Activity calendar

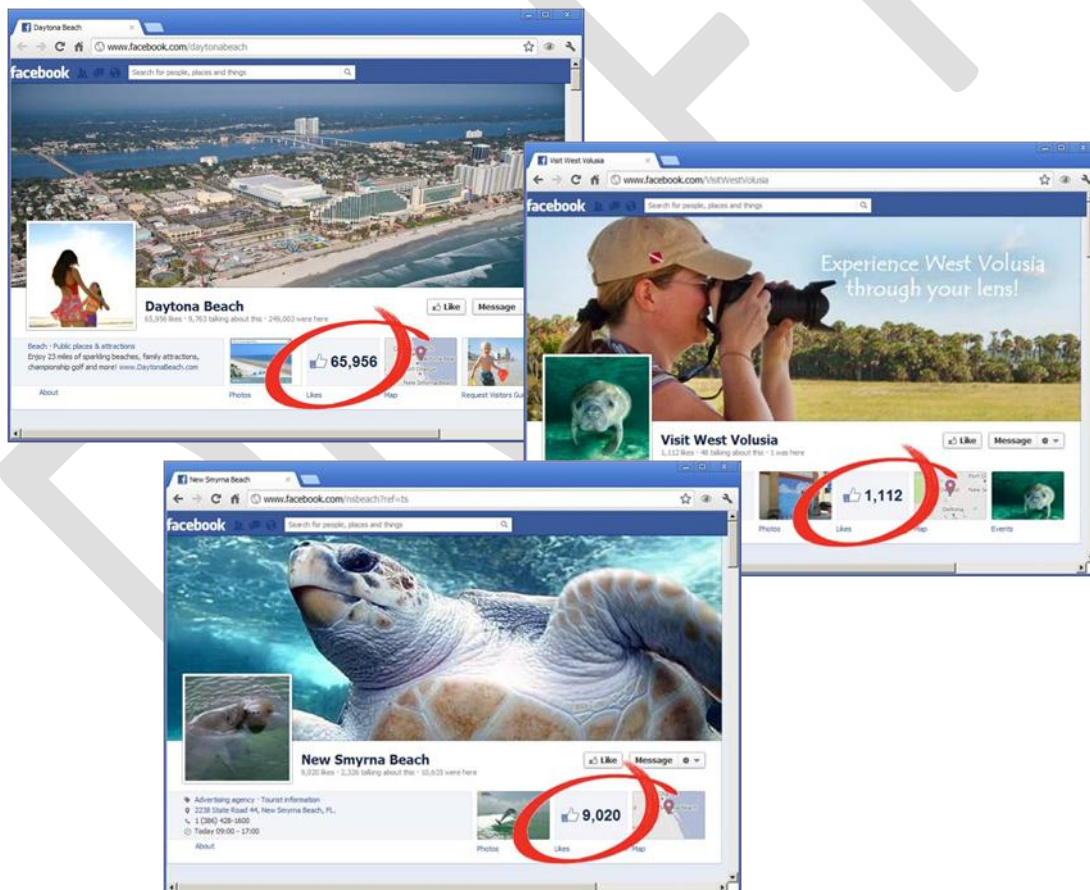
There are hundreds of events taking place throughout Volusia County. The shared service model will create a singular database for all entities to submit their events. Each advertising authority can “sort” the events in the most effective manner. This also will be a useful tool for other organizations to feature Volusia County events.

Social media shared services

Social media is a prime opportunity for shared services. The collective resources could be used to generate distinctive content for the three areas of Volusia County and also form content that would be beneficial to all regions.

The challenge with increasing social media activity is the resources needed to maintain a high level of online presence. This approach would maintain individual identity and create a more consistent resource to increase social media activity.

The three authorities potentially would share social media staff that would be focused on increasing overall activity.



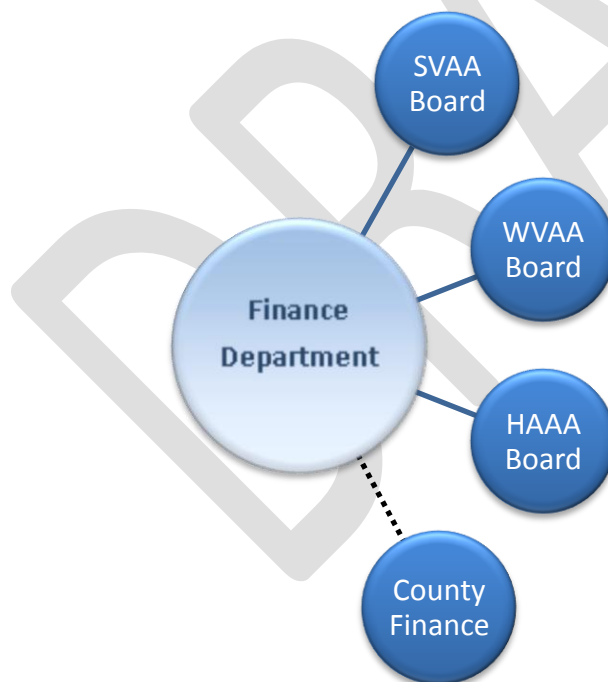
Research

The PRIZM study demonstrates the value of collaborative, countywide research. In the proposed shared service model, an annual research plan would be developed. This will include updating the PRIZM data and potentially having a centralized visitor profile report.

Finance and administration

In the proposed shared service model, financial statements for the three advertising authorities would be produced out of a centralized accounting office. This would provide important administrative support and a consistent approach to the financial reporting. The boards of directors would receive statements that are produced directly from a central accounting office.

Compliance – accounting practices



Procurement

An additional benefit of a centralized accounting and finance operation is to ensure consistency in the procurement process. It is recommended that standard procurement practices are developed for all of the advertising authorities in compliance with public purchasing requirements.

Software platform

It is recommended that there is a common software platform for the three authorities. This creates the opportunity to share data and content and create a standard reporting function. The use of a common platform also would create a centralized platform for updating information on hotels, attractions and other tourism information.

Reporting and measurement

It is recommended that common metrics are created for reporting the results of the advertising authorities. These metrics will include:

1. Room nights generated
 - a. Leisure
 - b. Group
2. Direct spending generated
3. Targeted brand awareness efforts
4. Overall economic impact

Centralized reporting

The County Council, boards of directors, and tourism stakeholders would receive a monthly overview of the advertising authority's results. This report would be a high level data-driven update of tourism results for the county.

Sample stakeholder report



**NEW
SMYRNA
BEACH
FLORIDA**



Where Florida's natural beauty
and heritage flourish.
WEST VOLUSIA, FLORIDA



**Daytona
Beach**
Area Convention
& Visitors Bureau

Tourism Marketing Report

February 2013

Room night generation - leisure marketing

FORECASTED 2013 CONSUMED ROOM NIGHTS - AS OF JANUARY 2013								
Advertising Authority	Room Nights Generated		Goals			Year-end Goals	Variance	
	Month	Year-to-Date	Goals	Variance	Year-to-Date		Variance	% of Goal
Halifax								
Southeast								
West								

Room night generation - group sales

ROOM NIGHTS BOOKED - JANUARY 2013								
Advertising Authority	Room Nights Generated		Goals			Year-end Goals	Variance	
	Month	Year-to-Date	Goals	Variance	Year-to-Date		Variance	% of Goal
Halifax								
Southeast								
West								

Total room night generation

2013 ROOM NIGHTS - JANUARY 2013									
Advertising Authority	Room Nights Generated		Room	Goals			Year-end Goals	Variance	
	Month	Year-to-Date		Goals	Variance	Year-to-Date		Variance	% of Goal
Halifax									
Southeast									
West									

Economic impact - direct spending

Advertising Authority	Visitors			Goals			Year-end forecast	Variance	
	Month	Year-to-Date	Direct Spending	Month Direct Spending	Year-to-Date Direct Spending	Variance		Variance	% of Goal
Halifax									
Southeast									
West									

Hotel/accommodator occupancy

Advertising Authority	Monthly Occupancy	Year-to-Date	Variance vs. previous year
Halifax			
Southeast			
West			

New marketing activities

Advertising Authority	Monthly Activities
Halifax	
Southeast	
West	

The shared service model will create support in many key areas of tourism marketing



Decisions remain with the authorities

The proposed model maintains the current practice for how overall marketing decisions are made. Each authority would be responsible for producing an annual marketing plan and proposed budget. The respective boards would approve these budgets and recommend them for approval by the County Council.

Increased marketing effectiveness

The implementation of the shared service model will create an opportunity for the three tourism authorities to put more focus on how to drive additional visitation to Volusia County.

A specific example of this is the effort that is being led by the West Volusia. This packaging effort would be enhanced with the support of a centralized fulfillment function.

Consistency in reporting and measurement

This model also will create consistency in how results are reported. This will create a common language among the authorities and an informed tourism community.

Shared service model recommendation

It is recommended that the shared serviced model is implemented to increase the effectiveness of the three advertising authorities.

Research

Research-driven marketing

SAG has worked closely with the advertising authorities to understand and evaluate current research. SAG interviewed members of the boards and advertising committees to understand the current practices in determining the target customer for Volusia County and the key areas.

It was very clear in these interviews that research results were not a focal point in the determination of media placements and overall messaging. There is a wide range of perceptions as to who the key targets are for each advertising area.

Consensus on the need to dig deeper

There is strong consensus and support for additional research to be undertaken to refine who the key target markets are for Volusia County. One long-term hotel owner stated that he had studied the customers in his hotel but strongly agreed with an analytical approach to understanding the target visitor. Companies such as Proctor and Gamble and other destinations have adopted a very aggressive research-driven approach to determining marketing direction. SAG proposed additional research to understand current and future targets for Volusia County tourism.

PRIZM Analysis (Potential Rating Index by Zip Market)



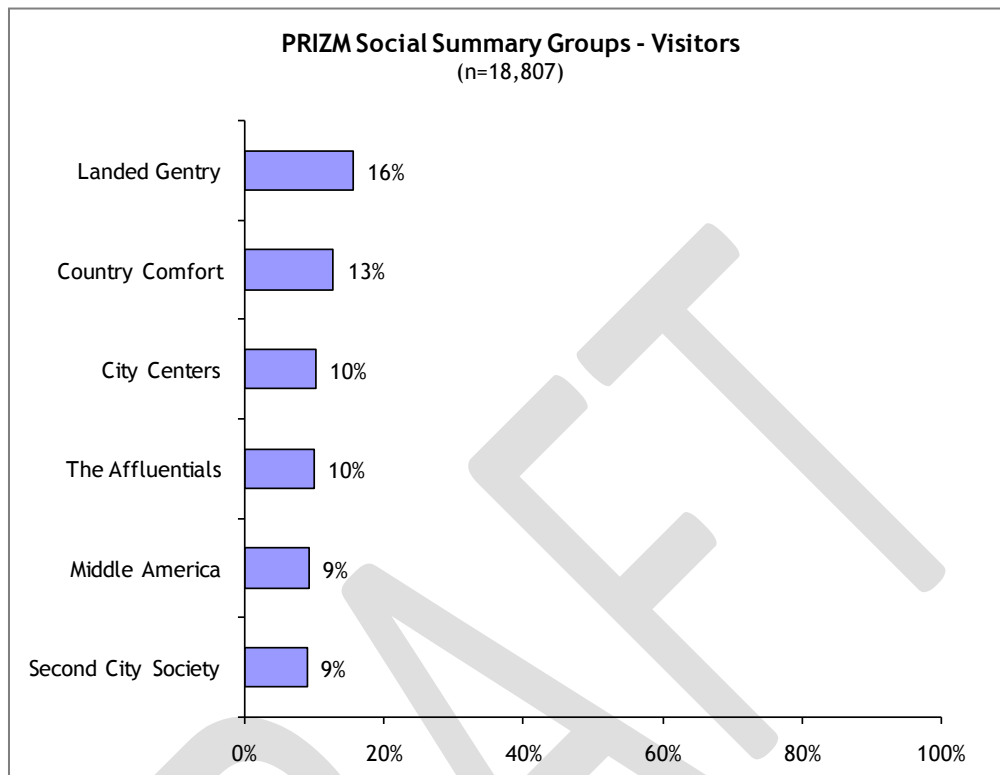
Upon SAG's finding that additional marketing research is needed, the County Council approved additional funding for a countywide research project using the PRIZM analysis to further define key target audiences.

Potential Rating Index by ZIP Market (PRIZM) is a service used by marketers that relies on census data and examines consumer lifestyles by ZIP code. The PRIZM system has classified every United States neighborhood into one of 66 clusters, each of which has a unique combination of characteristics and is designated by a title that describes the prevailing lifestyle. After marketers have defined their target market for a particular product, they will use PRIZM data to improve and focus their marketing efforts.

SAG has executed a PRIZM study for Volusia County. SAG would like to thank the Volusia County Hotel and Motel Association, the Daytona Beach Convention and Visitors Bureau, the Southeast Volusia Advertising Authority and the West Volusia Advertising Authority for their help in gathering the data needed for an effective study. Over 20 hotels and condos in Volusia County participated by supplying data. SAG did not receive a sufficient response from the West Volusia hotel community. SAG has offered to perform this analysis for West Volusia when sufficient data is gathered. The collection for the PRIZM analysis created a database of more than 77,000 past visitors. The concept of the PRIZM analysis is to compare the guest information to PRIZM segments which results in a robust database of demographic, lifestyle and media information.

The following is an overview of the results of the PRIZM study. The full PRIZM report will be submitted as an addendum to this report in the future.

Results of the PRIZM study – key segments



Key PRIZM segments for Volusia County

For purposes of this report, SAG will focus on the top two segments indicated from the PRIZM analysis. The following two segments visited the Daytona Beach area and Southeast Volusia throughout the year.

Landed Gentry – New Smyrna Beach/Southeast Volusia

The Landed Gentry social group consists of wealthy Americans who migrated to the smaller boom towns beyond the nation's beltways. Many of the households contain Boomer Generation families and couples with college degrees, expansive homes and professional jobs. They are twice as likely as average Americans to telecommute. With their upscale incomes, they can afford to spend heavily on consumer electronics, wireless and computer technology, luxury cars, powerboats, books and magazines, children's toys and exercise equipment.

2011 Statistics

U.S. households:	9,812,689	Median household income:	\$82,323
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Country Comfort – Daytona Beach Area

The segments in Country Comfort are filled with predominantly Caucasian upper-middle-class homeowners. In their placid towns and scenic bedroom communities, these Americans tend to be married, mostly between the ages of 25 and 54, with or without children. They enjoy comfortable upscale lifestyles, exhibiting high indices for barbecuing, bar-hopping and playing golf along with home-based activities such as gardening, woodworking and crafts. Reflecting their rural, family environment, they prefer trucks, SUVs and minivans to cars.

2011 Statistics

U.S. households:	11,851,298	Median household income:	\$55,843
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Daytona Beach and New Smyrna Beach

The PRIZM analysis revealed a difference in the predominate segments for Daytona Beach and New Smyrna Beach. The Daytona Beach Area had a higher concentration of the Country Comfort segment, while New Smyrna Beach had a larger mix of the Landed Gentry segment.

This creates an opportunity to create marketing plans that are designed to focus on how to grow segments which have a high propensity to visit Volusia County.

Information and media

The following are a sampling the top media and information vehicles for the top segments. This information is culled from extensive surveys and research made for these segments.

Landed Gentry

1. Satellite radio subscribers
2. Boating magazines
3. Audubon magazine
4. Runners World
5. ABC This Week
6. AARP
7. Airline magazines
8. Kiplingers Personal Finance
9. Parenting magazines



Landed Gentry media and information vehicles

Country Comfort

1. American Hunter
2. Field and Stream/Bassmaster
3. Fraternal magazines
4. Four Wheeler magazine
5. Parenting magazines
6. Boating magazines
7. Alternative rock radio
8. Adults standards radio
9. Classical radio



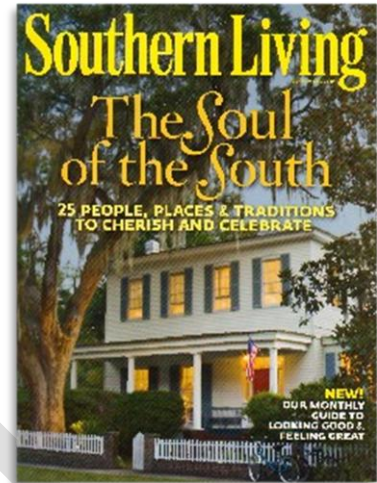
Country Comfort media and information vehicles

SAG has reviewed media plans for the advertising authorities and there is very little current use of these media outlets in marketing Volusia County. One notable exception is the use of fishing publications in the promotion of these activities.

Media placement case study

SAG observes that one of the traditional media outlets that has been used is Southern Living magazine. Southern Living is a highly successful publication with an annual circulation of 5.3 million readers. The average household income of Southern Living readers is \$73,485. This is more than 50 percent higher than the average household income of the visitor profile respondents and the primary segment that was uncovered in the PRIZM study for Daytona Beach Area.

It is recommended that the three advertising authorities adopt a “research-driven” practice in determining future marketing direction.



Comparison of key characteristics of Landed Gentry and Country Comfort segments

Demographics

The top two segments are predominantly Caucasian with a smaller number of Asians and African Americans.

Education

The Landed Gentry segment has a four-year college degree at a minimum and may have graduate degrees.

The Country Comfort segment has four-year degree, college educated consumers and those with some college education. A portion of this segment has a high school degree as their final educational level.

Household income

The Landed Gentry segment has a household income in excess of \$80,000 and the Country Comfort segment has a household income of just over \$55,000. These two segments have key differences that will require unique approaches in increasing their visitation of Volusia County.

Other notable outcomes of the PRIZM study

The Daytona 500 draws the most affluent visitors

SAG organized the data received by the time of year. Daytona 500 visitors have the highest household income of the weeks that were studied. It is important to note that the segments that were most prevalent during the Daytona 500 also visit Volusia County throughout the rest of the year.

Bike Week was the least affluent of the weeks studied

Bike Week had a less affluent mix of visitors. However, there are key segments of Bike Week that also visit throughout the year.

*Daytona 500 draws the most affluent visitors;
Bike Week the least affluent
of the events that were studied*

Daytona 500 (n=431) (A)	Bike Week (n=649) (B)	Easter (n=197) (C)	Biktoberfest (n=232) (D)
Landed Gentry	Country Comfort ^{CD}	Landed Gentry	Landed Gentry
Country Comfort	Landed Gentry	The Affluentials	The Affluentials
The Affluentials	Middle America	Middle America	Country Comfort
Elite Suburbs	City Centers	City Centers	City Centers
Middle America	The Affluentials	Country Comfort	Second City Society
Second City Society	Second City Society	Second City Society	Middle America

Seasonality

The PRIZM study also revealed that there were slight differences in the segments.

Segments vary slightly by season.

- Landed Gentry (a very affluent segment) is the top segment year-round, as is Country Comfort (a less affluent segment).

Winter (n=4,366) (A)	Spring (n=5,055) (B)	Summer (n=4,886) (C)	Fall (n=2,978) (D)
Landed Gentry ^C	Landed Gentry ^C	Landed Gentry	Landed Gentry ^C
Country Comfort ^{BD}	Country Comfort	Country Comfort	Country Comfort
The Affluentials ^D	The Affluentials ^D	City Centers	City Centers ^A
City Centers	City Centers	The Affluentials	Second City Society
Middle America	Second City Society	Middle America ^B	Elite Suburbs ^C
Second City Society	Elite Suburbs ^C	Second City Society	The Affluentials

Additional New Smyrna Beach research

In conjunction with a pilot project in Southeast Volusia, SAG conducted additional research for the purpose of creating a highly targeted list of potential visitors. SAG would like to thank the accommodators, hotels and bed and breakfasts, which supplied data for this study.

The following is a summary of the additional research for New Smyrna Beach.

- The household income range with the highest number of visitors was \$75,000 – \$99,000
- The highest concentration of visitors were in the age range of 45 to 54
- The top occupations were professional or technical areas and sales and service industries
- A very high percentage of current visitors are homeowners who have lived in their homes for over 15 years
- They are interested in health and outdoor activities

The most important finding was that there were approximately one million households that fit the key targets for New Smyrna in a 200 mile radius.

The opportunity is to create experiences and campaigns designed to increase New Smyrna's share of this market.

Visitor profile studies – existing data

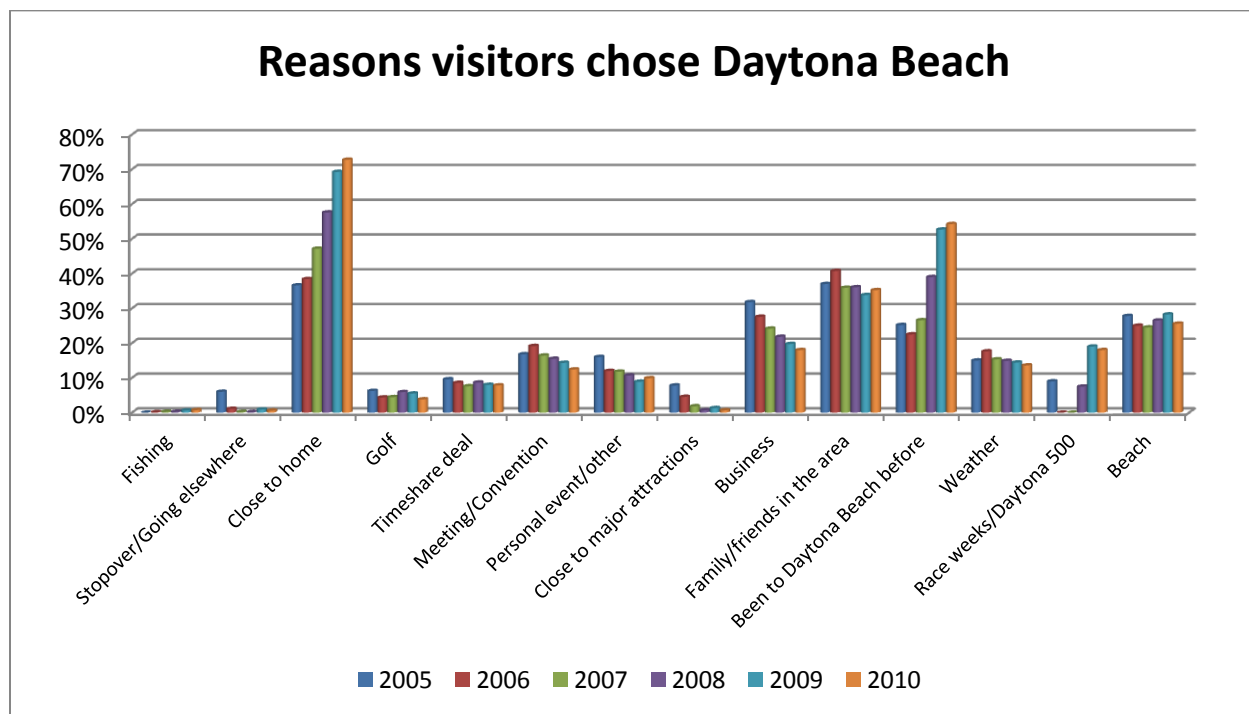
SAG reviewed the visitor profile studies that have been conducted over the past five years. SAG has compiled key information from this data for Daytona Beach and the Halifax Area. The visitor profile surveys have been completed for many years and are collected currently.

SAG focused on the following areas for this review:

1. The top reasons the respondents chose Daytona Beach
2. The general awareness of past advertising
3. The frequency of travel
4. The typical length of stay
5. The direct spending while in Daytona Beach
6. The average household income and income ranges
7. The online activities
8. The importance of online vehicles for vacation and trip planning
9. The household decision maker
10. Lead time in making a decision and reservation

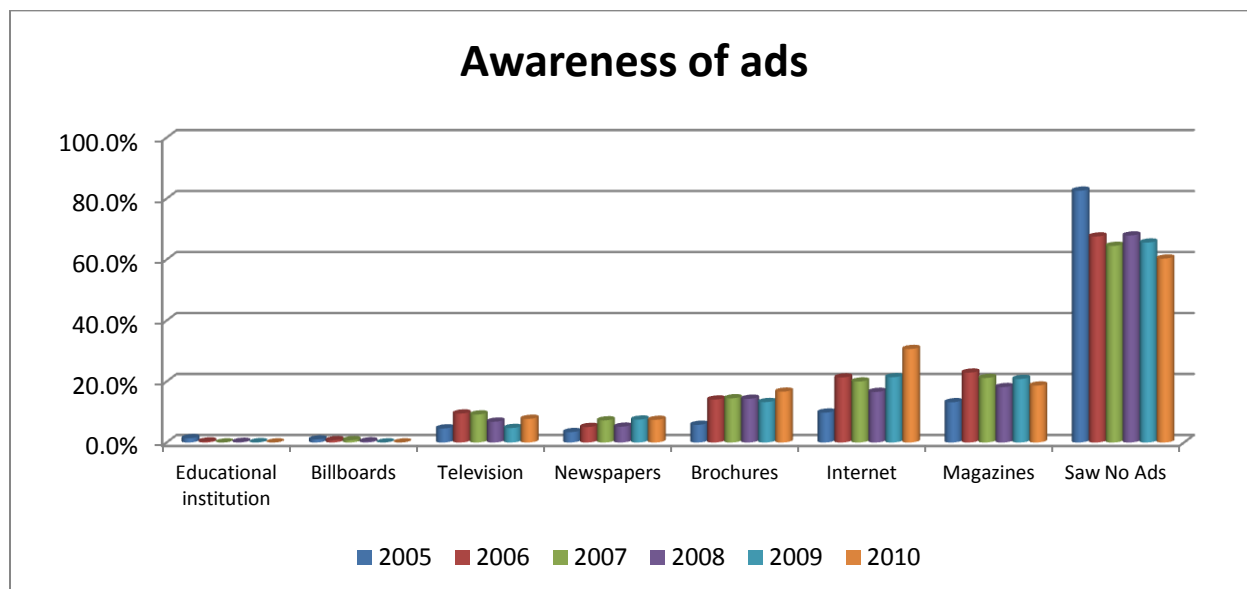
The following pages illustrate the trends for each of these areas.

Reasons visitors chose Daytona Beach



The importance of the proximity of Daytona Beach to the home of the visitor is a key reason for visiting. This would indicate the opportunity to drive additional visitors from the region. The results of this question also indicate the importance of the visitor experience. In 2010, over 50 percent of the respondents were repeat visitors to Daytona Beach. This would indicate that continued improvement in the visitor experience will build future occupancy. This reinforces the opportunity to target future visitors from a closer proximity.

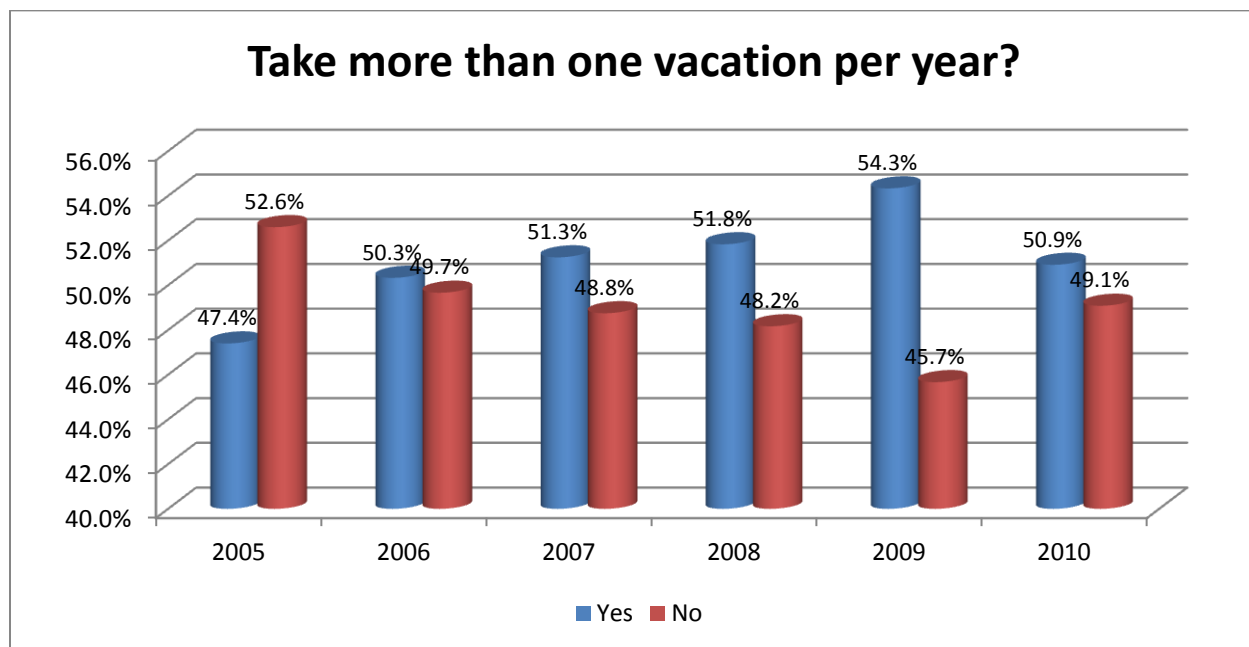
Awareness of current advertising



There is a positive trend of respondents that have seen a tourism advertisement. The percentages of respondents who had not seen any advertisement has decreased from a high of over 80 percent in 2005 to 60 percent in 2010. This is an indicator of the penetration of the current advertising program and the opportunity to explore new vehicles to increase awareness.

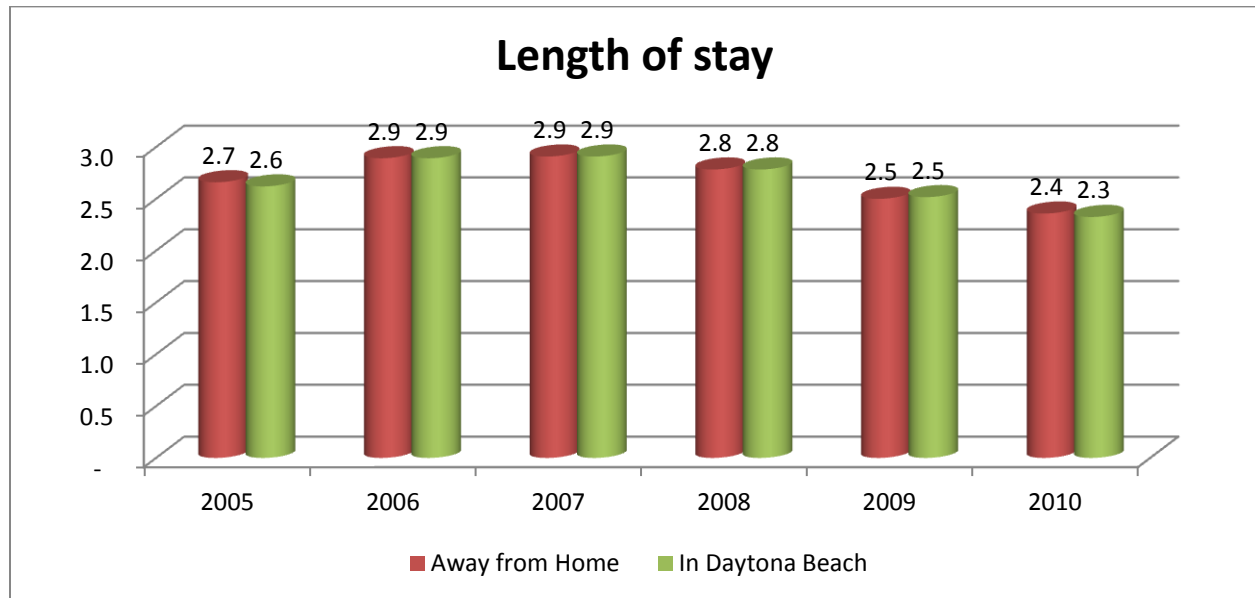
As would be expected, the internet continues to grow as an advertising vehicle. 2010 was the first year the internet drove more awareness with the respondents than traditional media.

Frequency of vacation travel



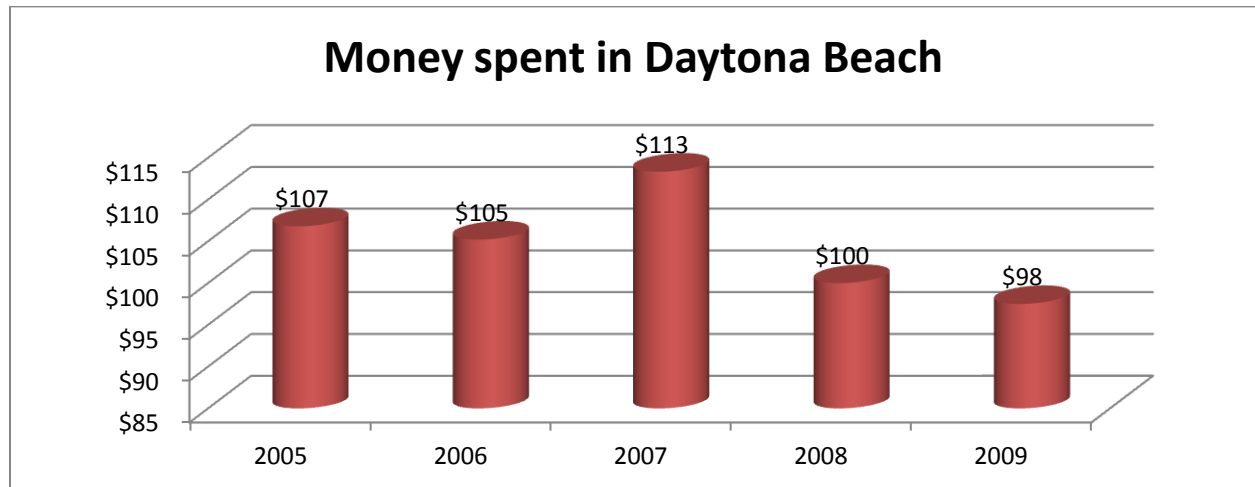
The trends indicate growth in the number of respondents who are taking more than one vacation per year. In 2010, the number decreased. However, Daytona Beach and Volusia County are positioned well as “drive in” markets and can be one of two vacation choices in a year.

Length of stay



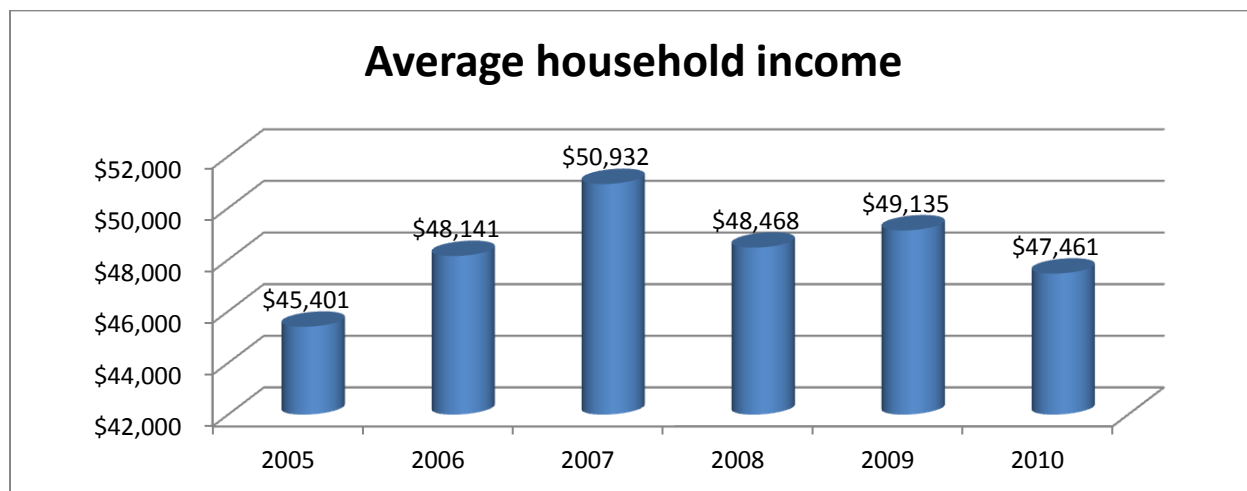
The trends related to length of stay are of concern. This could be an overall economic indicator or an opportunity to evaluate the tourism product. The challenge in the future will be to create and market visitor experiences that will compel future visitors to stay longer. The opportunity to create and sell multiple-day opportunities to a targeted audience will help in slowing this trend.

Visitor spending



The trends over the past five years of visitor spending are also a concern. The downward trend and the reduction in length of stay create an opportunity for the future. Collaborative efforts to improve the overall tourism product and experience should yield more opportunities to increase visitor spending.

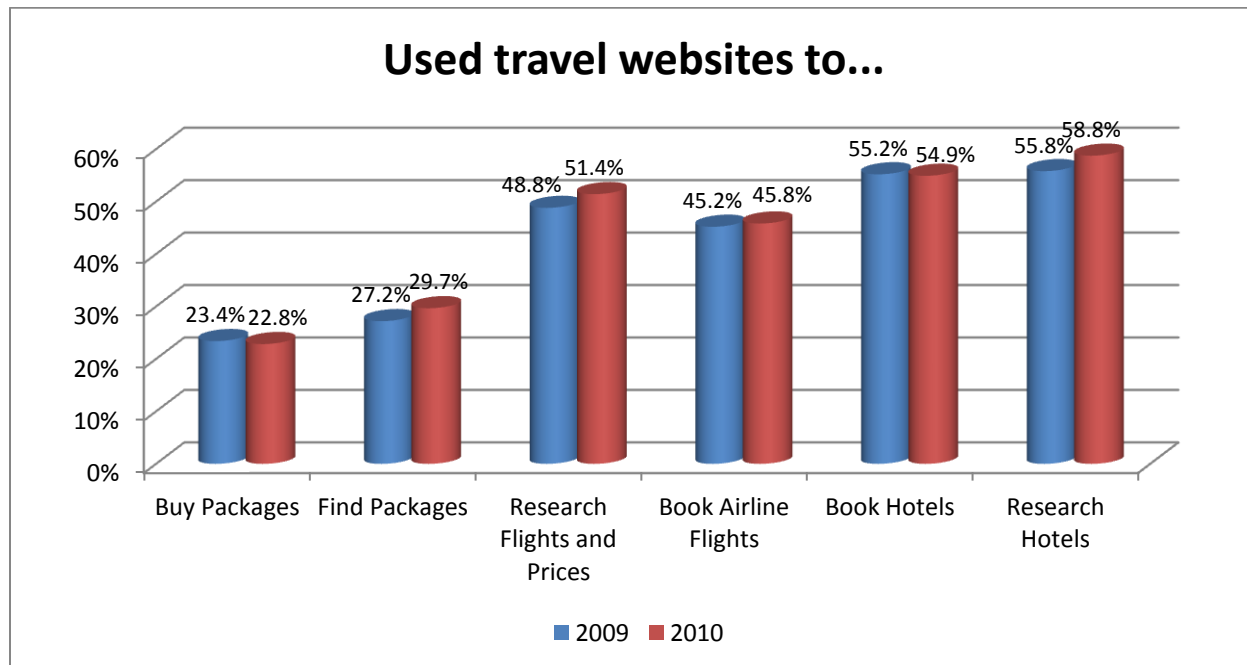
Household income demographics



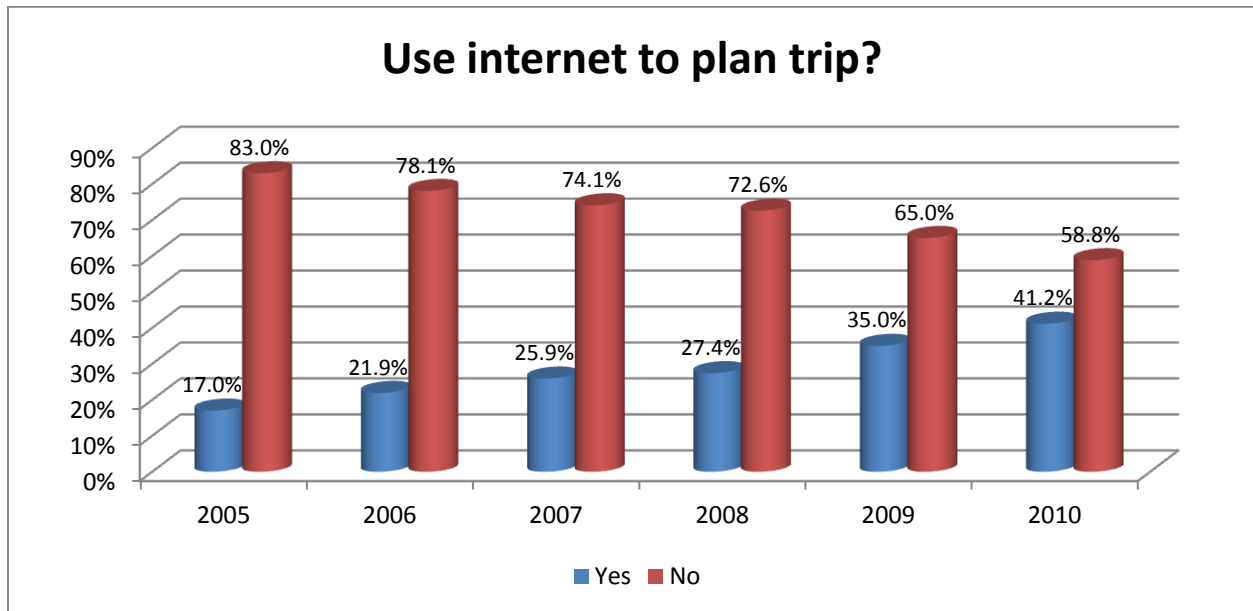
The household income of the respondents has remained fairly constant through the past five years. The results demonstrate the top two clusters of respondents range from \$30,000 to \$50,000 in household income. As a preliminary indicator of future target customers, this should influence the direction of future marketing efforts. This is consistent with the results of the PRIZM study.

Online indicators

The trends indicate the growing importance of online vehicles in future marketing efforts. The opportunities to focus marketing resources on specific targeted customers and create opportunities to book Volusia County experiences is a important benefit of online marketing.



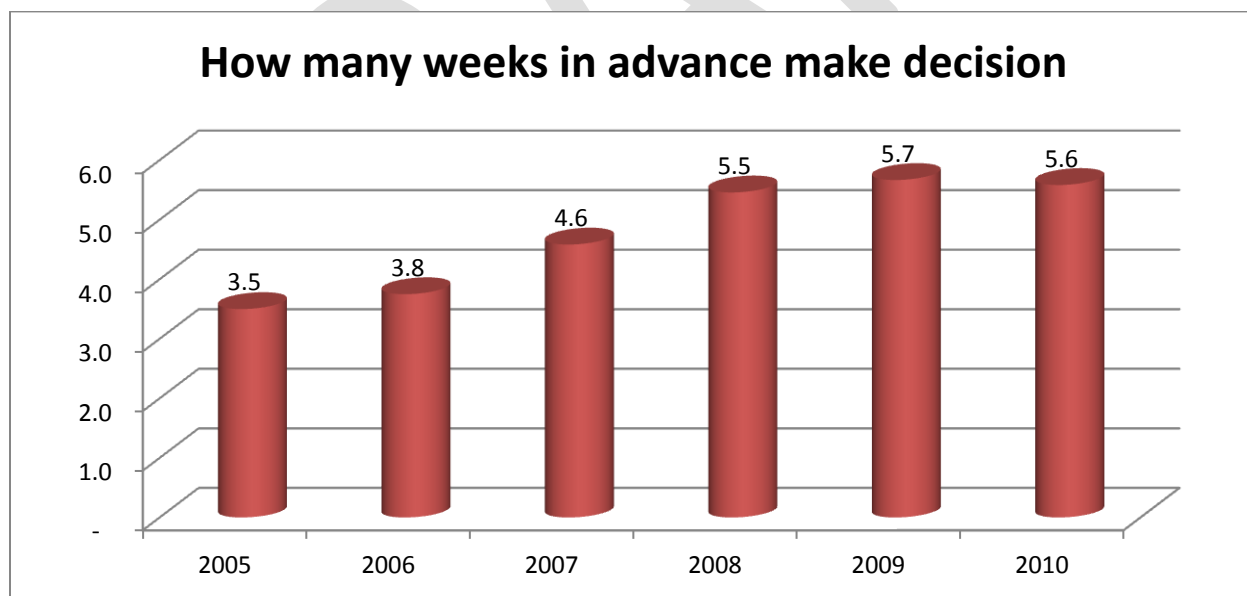
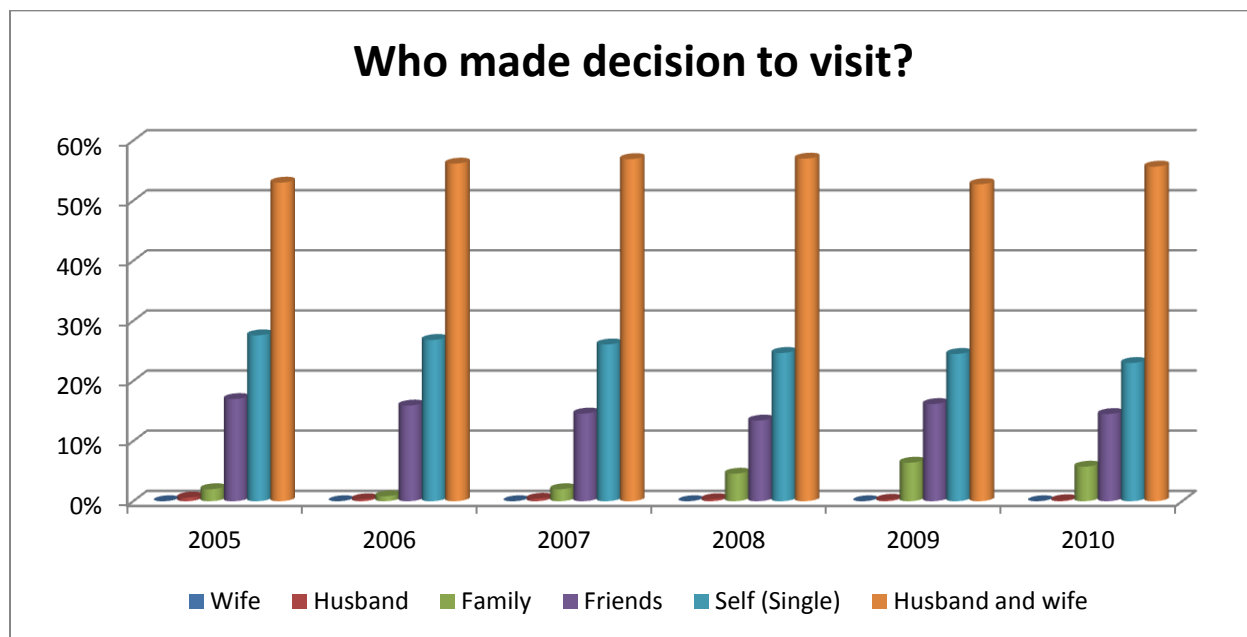
The last two years have shown a high percentage of the respondents use the web for one or more aspects of planning and booking their vacation. This percentage who research and purchase travel packages online is an opportunity for future direct sales efforts.



This indicates the increasing number of travelers who are using the internet to plan their trip. This further validates the future importance of increasing marketing resources that are dedicated to online opportunities. The recommendation to use direct marketing efforts will continue to be important in the future.

Decision making and planning

The following responses indicate the decision-making process used by the respondents:



The average length of time in advance that vacation decisions are made creates an opportunity to present shorter-term offers. This may be an important strategy in the future to appeal to the decision-making cycle. The ability to deliver packages directly to targeted customers will enhance the results of shorter term marketing.

Conclusion: research-driven

The combination of research that has been completed suggests specific targets for growing tourism in Volusia County. It is recommended that all future marketing plans contain a section on the latest research findings and how the recommendations tie to the PRIZM study and other research that has been conducted. The County Council should ensure that the marketing plans of the tourism authorities be based on research as a condition of budget approval. The adoption of a research-driven approach to future marketing decisions will create a new focus which should drive increased results in the future.

The implementation of a research-driven approach to marketing creates a clear opportunity for the tourism boards. This direction will give the governing bodies the ability to verify the accuracy and focus of future marketing efforts in relation to the research findings.

Sales and marketing

Leisure marketing

SAG has reviewed the marketing plans of the three advertising authorities. SAG also reviewed the advertising media schedules and collaborated with the authorities on the concept of developing specific packages and determining potential target audiences. The following quote states the importance of using online vehicles to reach the targeted customer.

The internet was used by approximately 90 million American adults to plan travel during the past year with 76 percent of online travelers planning leisure trips online. Most online travel planners are somewhat or extremely satisfied with their experiences in using the internet to plan their trips. Importantly, most see the internet as a very useful or essential tool for planning many/most aspects of a trip including where to stay overnight, planning travel routes, potential places to visit, attractions to visit, and learning about what to do. The primary tools for travel planning are online travel agency websites, search engines, company websites and destination websites. (Source: Travelers' Use of the Internet, 2009)

SAG has worked with the advertising authorities in creating and testing specific travel experiences. It is recommended that increased emphasis is placed on the creation of tourism experiences and targeting potential visitors through targeted marketing.

Following are current examples of these efforts.



The West Volusia Tourism Advertising Authority (WVTAA) has developed several unique packages that highlight the features of West Volusia. One example is the creation of fishing packages that highlight the St. Johns River. The team at WVTAA has met with the owners of Astor Bridge Marina, Blair's Jungle Den and the Highland Park Fish Camp to create three-day/two-night experiences that can include fishing guides who also are featured.

The West Volusia team met with fishing clubs and obtained a database of Florida residents and sent an email promoting the newly created St. Johns River packages.

St. Johns River Fishing Escapes

The West Volusia section of the St. Johns River boasts some of the best fishing Florida has to offer. Largemouth black bass, warmouth, bluegill, specks, stripers and catfish abound. Not only is the fishing great here, but a day out on the soothing sun dappled waters of the majestic St. Johns will refresh your spirit!

BASS FISHING at its BEST!

Come to West Volusia County and experience the finest freshwater fishing on the St Johns River.

Our specially priced packages pair discounted accommodations with half or full day fishing trips. Boat rental specials are available at some properties.

Don't delay in booking your trip today.



The number of packages sold needs improvement. However, the proposed shared service model would provide a central fulfillment system to support West Volusia in these packaging efforts. The West Volusia staff is committed to continue to test and refine these experiences.



Strategic Advisory Group met with many members of the Southeast Volusia community and asked questions related to the highest priority, targeted leisure visitor. The consensus of these interviews was that the Southeast Volusia Advertising Authority needs to become more focused on converting business through targeted marketing. Many stakeholders expressed an interest in participating in efforts to create specific tourism experiences and market them directly to potential customers who have been identified through research.

In these conversations, there is agreement to share data related to who currently visits the interviewee's hotels or condominiums. From the data that has been supplied, SAG determined that obtaining the names and addresses of past guests will improve the effectiveness of the conversion research project. The experts conveyed that the ability to focus on potential new customers will be enhanced with this information.

The following is an overview of the components of the one-to-one campaign execution. These steps are designed to maximize the response rate and gain additional insight on the interests of SVAA's target customers:

1. **Data from accommodators, hotel and a bed and breakfast:** SAG received guest data from two accommodators, a hotel and a bed and breakfast. This data was used to further refine the targets for the campaign.
2. **Database analysis:** SAG used a service that statistically profiles the best consumer customers. The house file is matched against a comprehensive database of U.S. consumers to create a customized market penetration analysis. The strength of this lies in its ability to provide up to 28 consumer demographic overlays, revealing more information about customers to market more effectively.
3. **Email data:** A targeted email list of potential customers who match up with some or all of the 28 consumer demographic overlays identified by the database analysis was purchased.
4. **Email creative:** Creative was developed for an email campaign with a call to action to go to a personalized universal resource locator (PURL) for more information. One version included a template and then subject lines, copy and photos that can be changed to create different versions for testing.
5. **PURL:** The PURL creates an individual, personalized website/landing page for each customer. The PURL addresses the recipient by name and is a continuation of the mail piece message. The PURL includes a survey with up to eight questions, a placeholder for supplied video to play, a

“refer a friend” offer and links to participating properties directly to reservations and various other sponsors or restaurants. The PURL tells us when someone logs on and tracks their actions while on the PURL. With the ability to track the user’s actions we can determine when the offer has been delivered and what actions are taken by the responders.

6. **Call tracking:** A call tracking service will be set up for up to six lines that tracks and records all inbound phone calls. Again, this is a good tool to measure response and to listen to calls.

The following is an example of the PURL used for the Southeast Volusia trail campaign expected to go live in the first quarter of 2013.





The Daytona Beach Convention and Visitors Bureau has begun moving resources toward a more targeted approach to potential visitors. The campaign above was sent to a targeted database to market short term opportunities and gain additional insight for future outreach.

The following is a recent quote from the Direct Marketing Association on the importance of direct marketing.

Direct marketing advertising expenditures now account for over half of total advertising expenditures and going forward, marketers will continue to be more cost conscious in their campaigns. While direct marketing has evolved drastically over the years and there are challenging times ahead, its measurability and accountability ensure that direct marketing is here to stay.



Volusia's ECHO experience – An opportunity to expand the visitor experience

While Volusia County's excellent ocean beaches are a major attraction for visitors, the county has many other features that must not be overlooked. This has been validated through Volusia's citizen-approved Volusia Forever and ECHO programs.

It's noteworthy that Volusia has in excess of 30,000 acres of scenic, pristine publicly-owned lands. In purchasing these magnificent properties, the promise has been made that these lands not only will be publicly preserved but also will be open and accessible for low intensity outdoor experiences. Volusia's scenic parks and public preserves are significant assets that need to be incorporated into the marketing initiatives of Volusia's tourism advertising authorities – collectively, not singularly.

Although the so-called "beach experience" tops Volusia's attractiveness for visitors, the so-called "outdoor experience" also appeals to a vast number of people who are seeking a leisure experience with a focus on the environment or "green" learning opportunity. These experiences also can be marketed as an opportunity to expand a vacation beyond just a beach.

There are significant opportunities in Volusia County to package an outdoor experience marketed to the outdoor vacationers who seek a healthy lifestyle leisure opportunity. The PRIZM research identified potential vacationers who would be attracted by a birding experience, a guided nature trail hike, kayaking, mountain biking or horseback riding. While the West Volusia Tourism Authority does focus some of its marketing to people with these interests, much more could be done, especially by the Daytona Beach Convention and Visitors Bureau and the Southeast Advertising Authority.

Fishing – offshore and inland – is a major marketing opportunity for all three tourism advertising authorities. Volusia's fishing and boating assets are significant and offer much opportunity for people

with these interests. The historic St. Johns River, the magnificent Indian River Lagoon and ocean fishing charter trips from Ponce Inlet and New Smyrna Beach are prime tourist attractions. The county's increasing number of manmade artificial fishing reefs should be promoted to anglers and divers and could be packaged with a visit to the nearby Marine Science Center.

Volusia's scenic landscape with beautiful ocean views and tree-covered rural roads offer opportunities to attract motorcyclists. Volusia already is a prime destination for bikers.

Volusia County has made an ongoing commitment to its growing outdoor trails program. The expanding trails network should be maximized. These wide, paved trails traverse some of Volusia's most scenic lands. The appeal of Volusia's trails to the biking, running and skating tourists should be capitalized on by county tourist promoters. Currently, these trails are under-promoted to the point they are a missed opportunity.

Not be overlooked are Volusia's cultural and historic features. Part of the county's appeal is its "old Florida" charm. Some would call it the more natural side of Florida. There are significant numbers of tourists who are seeking a learning experience from a history perspective. The Pioneer Settlement in Barberville offers a look at life in Florida's earlier days. Volusia has many historic resources that can be promoted. The county's proximity to historic St. Augustine and the Kennedy Space Center are important.

The county's ECHO program that provides match money for cultural projects creates many visitor experiences. The historic Athens Theatre in DeLand, the Gateway Center in DeBary, the Casements in Ormond Beach, Volusia's historic courthouse, the Ponce Inlet Lighthouse and the DeBary Hall Historic Site offer great opportunities to attract "historic" tourists.

The Museum of Arts and Sciences in Daytona Beach is among Volusia's more noteworthy cultural attractions. It will be enhanced by what arguably is the largest collection of Florida focused art in the world in the soon-to-be-built Hyatt and Cici Brown wing at the museum. This unique art collection should be promoted by the county's tourism entities. Volusia's large collection of public facility art exceeds 200 pieces. This too should be part of the county's appeal to the cultural visitor.

It is recommended that comprehensive experiences are developed that encompass the wide variety of visitor opportunities.

Group sales and marketing – Ocean Center

During this process, SAG has spent considerable time reviewing the activities at the Ocean Center. In the initial review of materials and overall results it was clear there is concern over the financial needs of the Ocean Center and an interest in how to increase the room night and revenue generating activity.

SAG has had meetings with the staff of the Ocean Center, numerous hotel and industry stakeholders and the Daytona Beach Convention and Visitors Bureau group sales leadership. SAG has facilitated a joint meeting with the bureau's leadership and the Ocean Center leadership. It is important to note there has been a high level of cooperation throughout this review.

The common theme throughout these meetings was the need to improve the results of the Ocean Center. In all of the above mentioned discussions, participants consistently wanted to see a new direction on how to increase the overall impact of the center.

SAG is recommending a new approach to group sales and marketing that creates joint accountability and maximizes available resources. The core of the joint accountability is between the Ocean Center and the Daytona Beach Convention and Visitors Bureau. However, it also encompasses the broader tourism industry and all of the current governing bodies. The Ocean Center is an important tourism asset for all of Volusia County. The recommendations also create a seamless sales and service experience for the Ocean Center and Volusia County clients.

Currently, the Ocean Center and the Daytona Beach Convention and Visitors Bureau do not share collective goals. For example, the Daytona Beach Convention and Visitors Bureau has no specific goals related to Ocean Center revenue or its overall financial success. Likewise, the Ocean Center does not have room night goals for the sales team that are formally tied to their performance. This is not a reflection of the effectiveness of the current respective teams. However, it is recommended that both sales and marketing teams are measured with the same overall goals as part of the proposed new direction.

A joint “best practices” paper driven by the two national associations representing convention and visitors bureaus and convention centers has this statement in the introduction:

One underlying objective that cannot be overstated: provide the destination customer with a seamless positive experience from the onset of the sales cycle through move out.

Collective mission and universal goals

There is an important balance in evaluating the performance of a convention center between the economic impact to the community and specific financial results. The most important benefit of a seamless environment is the accountability for a mutually agreed upon set of goals. The following are examples of goals that are recommended to be shared by the governing bodies and staffs of the Daytona Beach Convention and Visitors Bureau and the Ocean Center.

1. Economic impact/direct spending
2. Room night generation
3. Ocean Center revenue
4. Attendee/client satisfaction
5. Ocean Center profitability

Governance buy-in and collaboration

It is recommended that these goals be adopted by the County Council and the HAAA board as mutual goals. These goals will be presented and approved as part of the overall annual budget and goal setting process. With this in place, a foundation will be created to support the proposed seamless approach to group sales and marketing. This process also will create new institutional accountability for the Halifax Advertising Authority and the Daytona Beach Convention and Visitors Bureau.

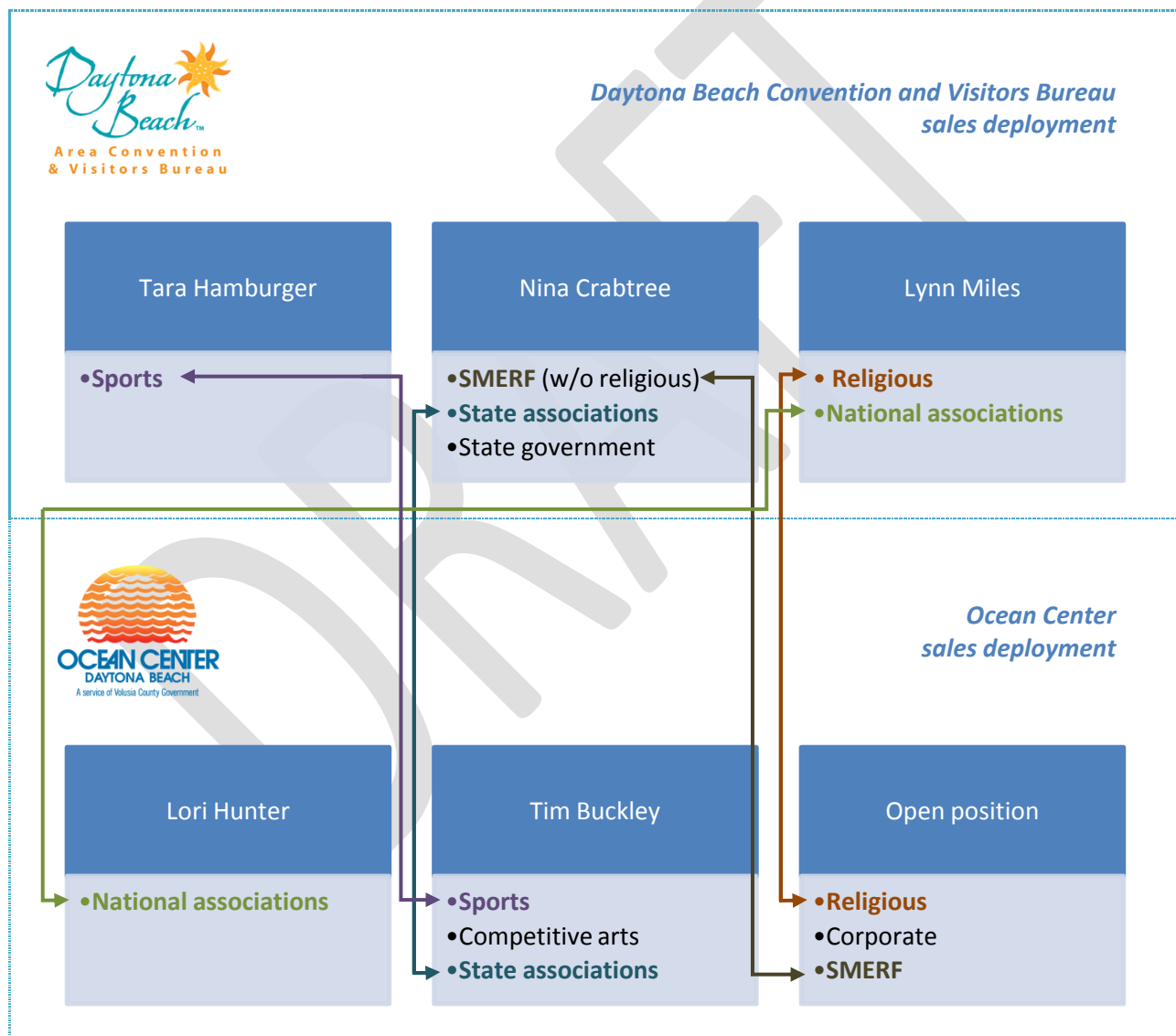
Booking policies – prioritization

It is recommended that, as part of the implementation process, that booking policies be reviewed for the Ocean Center. A revised booking policy should be proposed collaboratively by the Ocean Center and convention and visitors bureau teams to the County Council and the HAAA board. This process also should include tourism stakeholders to establish broad-based support for the agreed upon direction. Booking policies are designed to support the overall mission and goals of the center. The booking policies should support the “highest and best” use (citywide conventions) for the Ocean Center as the highest priority. An effective booking policy also is designed to maximize the financial performance within the overall agreed upon priorities.

Current deployment diagram – overlap exists

This diagram demonstrates the current group sales deployment between the Ocean Center and the Daytona Beach Convention and Visitors Bureau. Currently, there are three group sales managers at the Ocean Center and the same number at the bureau. This presents an opportunity to have six sales managers working in a “seamless environment” to increase overall group sales for Volusia County and the Ocean Center.

The following shows the current market deployment of the group sales team.



This diagram demonstrates the overlap in market responsibilities between the two sales teams.

Seamless sales team – maximize collective resource

The opportunity to create a seamless sales environment will maximize current sales resources. The above diagram demonstrates the current duplication and overlap in the group markets that are currently targeted. In a seamless environment, deployment would be determined by evaluating how to most effectively target a six-person sales team.

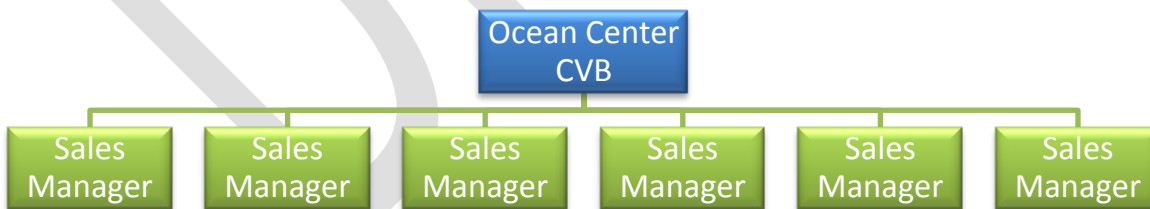
In SAG's meetings with the sales teams, it was apparent there are sales people attending some industry trade shows, both pursuing the same customer. This is an example of duplication of effort and has the potential to cause confusion among potential clients.

Current Organizational Chart



In this current structure for group sales, the two teams function very independently. This includes separate marketing plans, separate goals and measures of success.

Future structure



It is recommended that a seamless sales environment that maximizes current resources is created. The increased productivity from this approach will enhance future production in group sales for Volusia County and is a more efficient use of public resources.

Fundamentals – “functionality informs structure”

SAG has worked with many destinations in evaluating effective convention center/convention and visitor bureau group sales structures. The industry has been studying this question for many years. A white paper was written by the leading associations for Convention Centers and Destination Marketing Organizations in 2007. The white paper emphasizes the importance of functionality in an effective approach to group sales.

The following are the key components of the recommended fully functional group sales operation. It is recommended that these key principles are implemented for an effective group sales and marketing effort for Volusia County.

Singular marketing plan

For the group sales and marketing operation of the future to function effectively, the Ocean Center and Daytona Beach Convention and Visitors Bureau teams must create and execute a joint marketing plan. This plan would include:

1. Industry trends – economic indicators
2. Research results – ongoing activity
3. List of joint sales activities
 - a. Trade shows
 - b. Sales mission
 - c. Familiarization (FAM) trips
4. Joint advertising plan
5. Targeted market segments
6. Public relations strategies
7. Stakeholder communication plan
 - a. Joint reporting
 - b. Audience
8. Online strategy
9. Joint goals
10. Holistic group sales and marketing budget

The development of a joint group sales and marketing plan creates an annual road map for maximizing the collective group sales and marketing resources. This marketing plan would be developed by the

entire group sales and marketing team and would be presented jointly to the industry stakeholders and governing bodies.

Market prioritization

The current staff members that are involved with group sales and marketing would participate in an annual market prioritization process. The purpose is to continue to validate and refine the target markets for Daytona Beach and Volusia County. SAG has reviewed the history that is available of the group activity by market. After the internal teams have completed their reviews, the findings would be presented to the key tourism stakeholders for confirmation and support.

Deployment plan

The process for creating a comprehensive deployment plan would be first to identify the highest priority group markets. It is recommended that ongoing research be conducted with meeting planners to refine the current priorities. Based on the current deployment, the following markets would be evaluated in the process:

1. Religious
2. State association
3. National association
4. Sports
5. Competitive arts
6. Social, military, educational, religious and fraternal markets (SMERF)
7. Corporate

The goal for the deployment process would be to maximize the effectiveness of the six group sales managers. Sales managers would be assigned specific markets and geographical focus.

Maximization of marketing channels

The key marketing channels for increasing awareness of Daytona Beach and Volusia County as a group market should be coordinated to maximize penetration of the meetings market. The collective team should review the current plans and resources in the following areas and determine the most effective strategies in each.

1. Public relations

- a. A joint approach to public relations will ensure this important marketing vehicle is focused on areas that support the most important markets to all of Volusia County. The determination of which vehicles will create the highest return is another feature of a collaborative approach to public relations.
2. Advertising
 - a. The combined budget for the Daytona Beach Convention and Visitors Bureau and Ocean Center for advertising in the group market is \$375,000. The combined funds should be used to increase awareness in those markets with the highest return. This process includes creating a consistent image when marketing to meeting planners and group decision makers.

Ocean Center Marketing

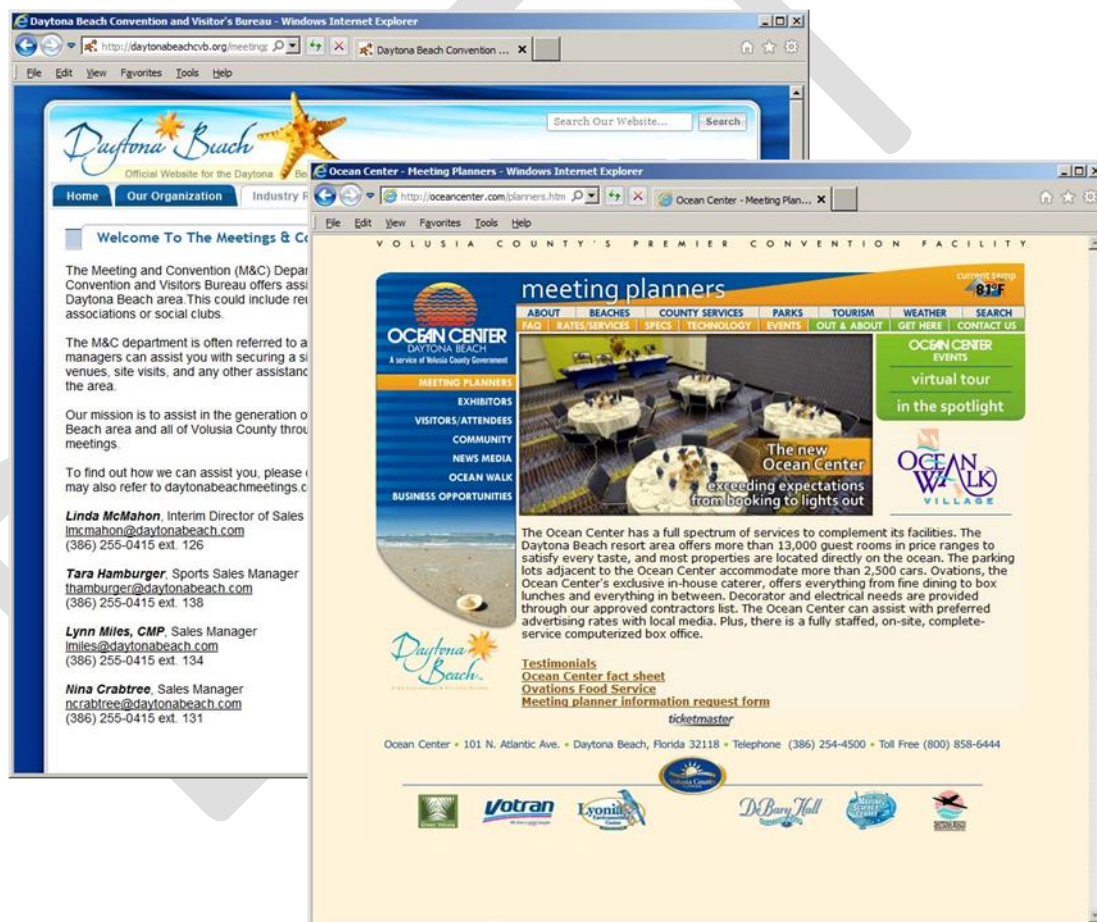
The opportunity for collaboration

The following is an example of the opportunity for collaboration:



These two advertisements have been designed for the Ocean Center and the Daytona Beach Convention and Visitors Bureau. The targeted readers are meeting planners.

3. One-to-one marketing – singular database
 - a. The approach to one-to-one (database) marketing should be planned collaboratively. This gives the entire team the opportunity to plan key messages and promotions to customers who are in the group sales database.
 - b. A common database of clients is essential to the creation of an effective direct marketing campaign.
 - c. A singular platform also will enable the sales teams to work collectively on a single database of current and future customers.
4. Online marketing – singular meetings portal



- a. In the area of online marketing, there is the opportunity to create one experience for the meeting planner. It is recommended that the two meeting sites use the same content

and that meeting planners be directed to one website when considering bringing a meeting to Daytona Beach/Volusia County. The value of this approach is to create the most effective content for all online activities. This also creates the opportunity to direct meeting planners to one online request for proposal (RFP) location.

Holistic goal setting

Goal setting is a cornerstone of a successful sales and marketing operation. It is recommended that goals be created jointly. This creates the opportunity to set the overall goals for the group market and determine collectively which markets present opportunities for growth. The proposed goal setting process also includes joint accountability for room night production and Ocean Center revenue between HAAA and the County Council.

The goal setting process is also an important opportunity in group sales. It is recommended that the approach begins with the individual sales managers, includes the tourism industry and final approval by the governing bodies. The following are the recommended steps in the goal setting process.

Market analysis – review research

1. Analyze data from available research
2. Review meeting planner feedback

Production history

1. Review past production history for all group markets

Internal review

1. Revisit geographic territories by sales managers
2. Review assignments based on vertical markets, i.e. religious, state associations, etc.
3. Confirm measurement standards, i.e. room nights, Ocean Center revenue and economic impact

Sales manager involvement – initial goal setting

1. Individual marketing plans are created by sales managers for their vertical markets including proposed new initiatives
2. Sales managers create their annual targets using all of the information gathered above
3. Sales managers present goals with recommended supporting marketing activities

First review – Ocean Center and convention and visitors bureau directors of sales

1. Review the individual marketing plans by sales managers and their expectations of projected production activities for future years
2. Review history of production in individual markets
3. Works toward consensus if adjustments to goals are needed
4. Present individual and team room night and revenue goals

Second review – Ocean Center Director and Daytona Beach Convention and Visitors Bureau CEO

1. Review individual goals and methodology
2. Review overall team goals – evaluate year-over-year growth
3. Develop consensus for recommendations

Third review – tourism industry advisory committee (Tourist Development Council)

1. Presentation from group sales leadership
2. Review individual markets and overall team goals
3. Review production history
4. Confirm alignment with industry
5. Recommend adjustments
6. Gain approval and support

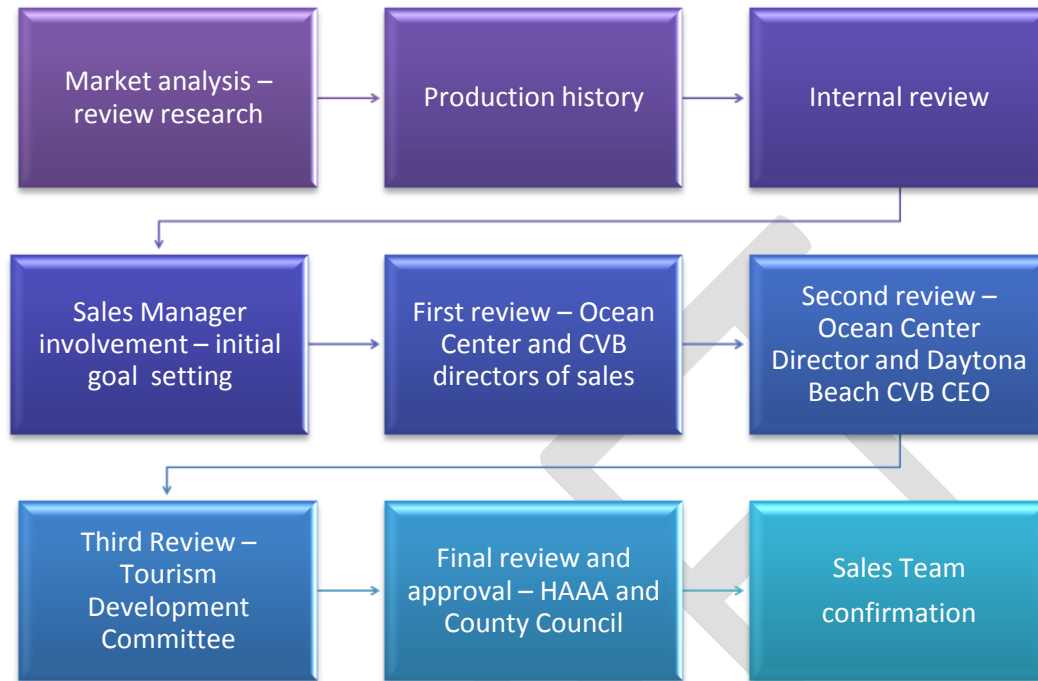
Final review and approval – governing bodies

1. Presentation to HAAA board and County Council
2. Review of methodology and process
3. Final approvals for goals

Sales team confirmation

1. After governing body approval, communicate back to the sales team

Flow Chart – Goal setting process



Business development

The function of researching and prospecting for new group business would be managed jointly with specific metrics on new qualified leads generated through this effort. The determination of which markets have the greatest potential will be the basis for business development activities.

Incentive plan

The institution of a sales incentive plan creates an environment that rewards performance. It is recommended that a common incentive pay plan be implemented for all group sales managers. The plan would reward sales managers who achieved 100 percent of the goals or greater.

An incentive-based pay plan creates an environment that focuses on high performance and rewards production. Combined with a competitive base salary, an incentive plan will reward and attract high performing sales leaders.

An incentive plan is designed to provide:

- Flexibility year to year as to the number and nature of each criteria
- Flexibility year to year as to the weight assigned to each criteria by percentage

It is believed it will be necessary to adjust the criteria and weight of each by sales executive to tailor their incentive to their areas of responsibility and the current market conditions and market plan emphasis. The template provides the ability to do this while still using the same format for simplicity of administration.

Although the criteria of an incentive plan can vary by year and sales region, it is recommended that the overall focus of the plan be criteria based on booked room nights and Ocean Center revenue. There may be other criteria used based on the circumstance such as booked room nights in need years versus non-need years and team goals, etc.

The percentage of base salary that can be achieved in the proposed incentive plan is set at 40 percent. To achieve a 40 percent incentive payout, a sales manager must achieve 120 percent of the agreed upon goal. The incentive payout for achieving 100 percent of an annual goal is 10 percent. Incentive payouts begin at 100 percent goal achieved with a maximum of 120 percent. See example below:

Incentive payout schedule	
Percentage goal achievement	Percentage incentive compensation
100 percent	10 percent
105 percent	17.5 percent
110 percent	25 percent
115 percent	32.5 percent
120 percent	40 percent

Annual audit

The sales results will be audited prior to the annual incentive payouts through an independent auditor to ensure consistency in the forecasting methods and expenditures.

Sales performance plan

The implementation of a sales performance plan for all group sales managers is a fundamental principle of a highly effective group sales operation. The implementation of a jointly supported plan will create consistency in how sales managers are supported in achieving their goals.

The following is an overview of a recommended approach:

- Sales performance program goals are determined by calendar year.
- The sales performance plan uses a nine-month performance monitoring period. The nine-month period is ongoing or a rolling period of time, using three-month periods or quarters.

Minimum sales performance goal components are:

- Minimum 85 percent conversion of targeted room nights in a rolling nine-month period.
- Minimum 85 percent achievement of Ocean Center revenue goals (revenue is defined as food and beverage, facilities use, ancillary services, etc.)

Minimum performance illustration

		<i>Room nights booked</i>	<i>Center revenue confirmed</i>
<i>Quarter 1</i>	<i>3 months</i>	<i>85 percent*</i>	<i>85 percent</i>
<i>Quarter 2</i>	<i>3 months</i>	<i>85 percent*</i>	<i>85 percent</i>
<i>Quarter 3</i>	<i>3 months</i>	<i>85 percent</i>	<i>85 percent</i>
<i>Cumulative performance</i>	<i>9 months</i>	<i>85 percent</i>	

*below 70 percent achievement of goal in a two-month period will result in not achieving minimum performance.

- Each sales director/sales manager is expected to meet their defined goals. Sales performance goals will be monitored and discussed continuously. The leadership of the sales team will monitor performance monthly. An individual performance report for each sales director/sales manager will be generated monthly. The sales management team will review each sales director/sales manager's individual performance monthly. The governing bodies will oversee the administration of the sales performance plan.

Performance improvement plan (PIP)

Overview

A performance improvement plan (PIP) is designed to identify performance issues and determine potential support that can be provided to improve results. The PIP is designed to ensure consistent implementation of sales performance for all group sales directors/sales managers. The supervisor in conjunction with the executive sales leadership will administer the PIPs. The management team is accountable for administering the plan as outlined. The human resources (HR) department will keep all records of these activities as part of the sales director/sales manager's employee file.

A sales director/sales manager not satisfactorily meeting their defined minimum goals as described above will be placed on a PIP. The PIP process is implemented when the individual has not satisfactorily met 70 percent of their goals within a 60-day period or is below 85 percent of their goal in a 90-day period (or for a rolling three quarters). Should the sales director/sales manager continue not to meet their defined minimum goals after being placed on PIP, then further disciplinary action including, but not limited to verbal warning, written reprimands, suspension and/or termination may be imposed.

New hires:

- The annual performance goals of newly hired sales directors/sales managers are determined on the standard percentage calculation using a prorated formula. Sales performance plan monitoring will begin after 30 days of employment.

To recap:

- The PIP is implemented when the individual has not satisfactorily met 70 percent of their goals within a two-month period.
- The PIP is implemented when a sales director/sales manager is below 85 percent for a quarter and/or a cumulative nine-month period.

A comprehensive, uniformly administered, sales performance plan is a cornerstone of an effective group sales and marketing effort for Volusia County.

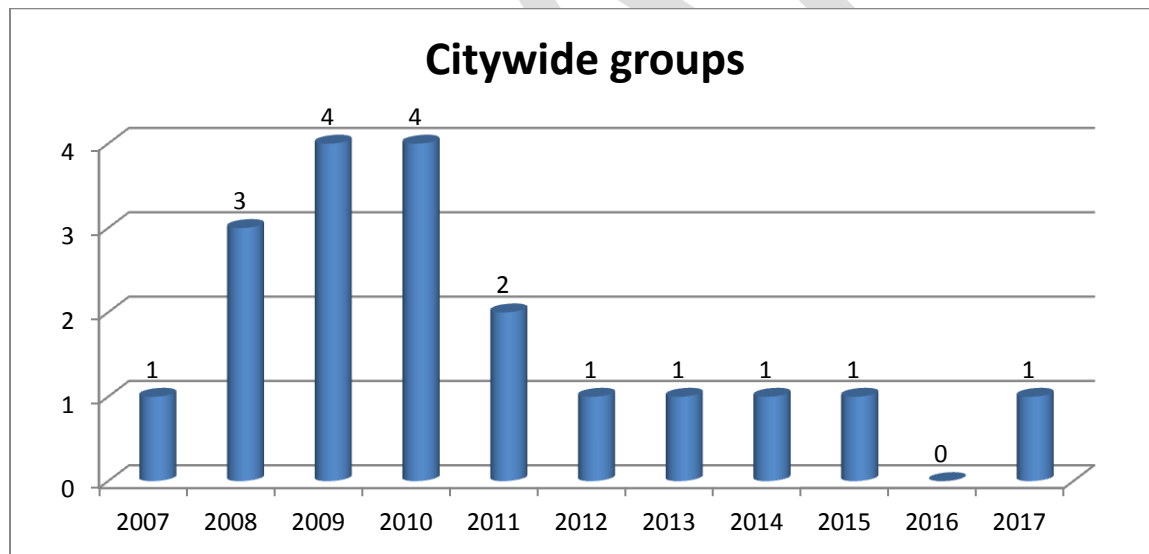
Past performance – “highest and best use”

SAG reviewed the past booking performance of the Ocean Center. SAG met with the Ocean Center and Daytona Beach Convention and Visitors Bureau staff to gain consensus on the “highest and best use” for the Ocean Center. There is consensus that the “highest and best use” of the Ocean Center is hosting citywide groups. This is aligned with the goal of creating the highest economic impact possible from the activity at the Ocean Center.

In conjunction with the staff at the Ocean Center and Daytona Beach Convention and Visitors Bureau, a citywide group is defined as:

1. Using a minimum of three Volusia County hotels
2. A minimum of 1,000 rooms on the “peak” night (the largest need for hotel rooms on one night during the conference or convention)
3. 5,000 room nights requested or blocked
4. A range of attendees from 2,000 to 5,000

The following is a chart with the number of citywide groups that have met or are currently booked into the future:

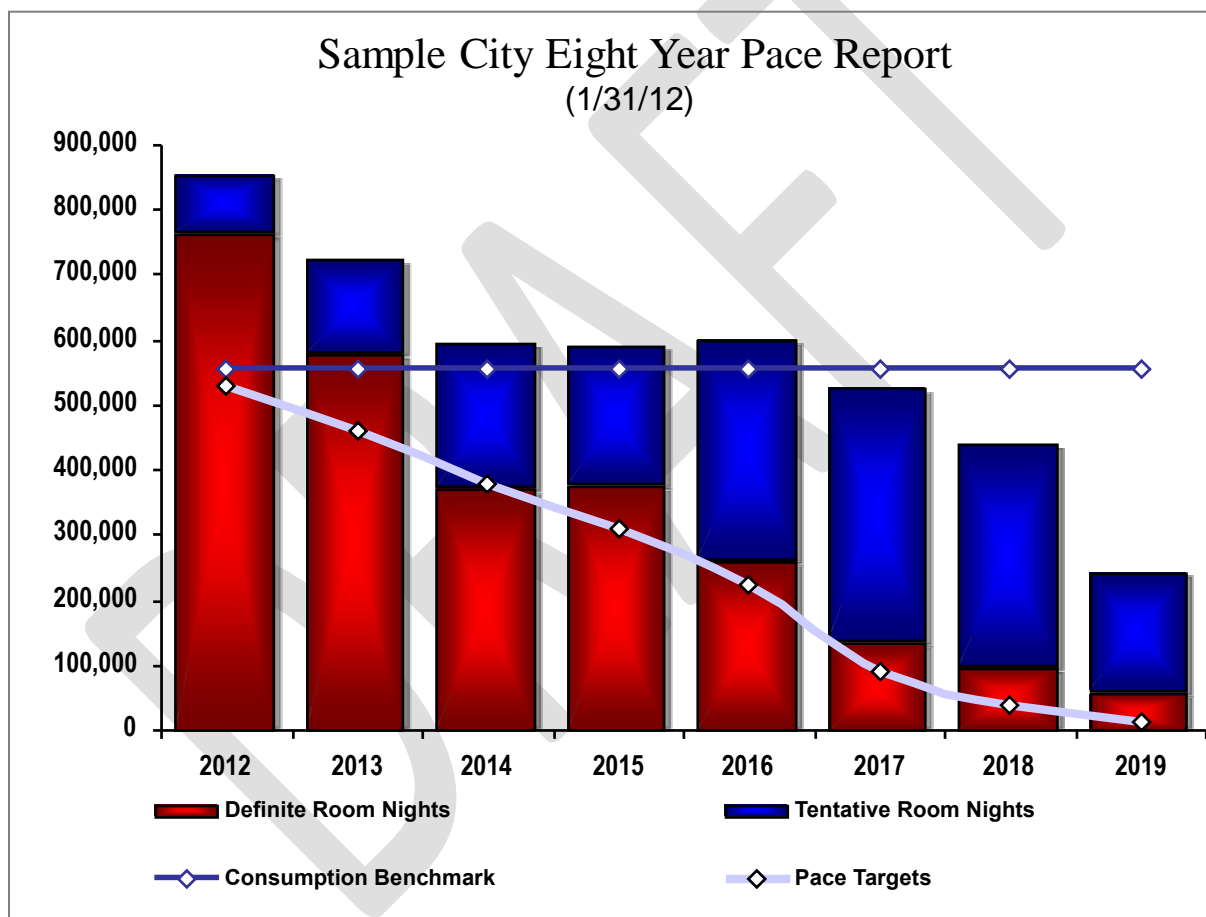


Citywide groups are a critical part of a convention center’s success. These groups have impact in most of the key measurement areas. There is an opportunity to increase the number of citywide groups with the recommended new approach to group sales and marketing.

Pace (future years) Reporting

An important ongoing analysis of the success of a group sales and marketing effort is known as a Pace report. This enables stakeholders and the management team to analyze the amount and timing of business that has been secured for future years. The Pace report will identify those months where there is a need to potentially offer incentive and focus the sales effort. The Pace report also will show the likelihood of achieving future group sales goals.

It is recommended that a Pace report is developed for review by the governing bodies, the County Council, and tourism stakeholders.



Impact of the proposed seamless sales and marketing approach

The recommended new direction for group sales and marketing establishes the greatest opportunity to increase the level of citywide business in the future. The additional impact of an effective deployment model that maximizes the collective resources with a consistent sales performance plan will increase the level of citywide activity in future.

The long-term goal of the new approach to group sales and marketing will be to have one to two citywide groups per month at the Ocean Center. SAG would forecast that the successful implementation of the proposed sales and marketing approach will add three to five citywide groups annually to future years.

The desired activity level should be able to be achieved within the next five years with a concentrated, collaborative effort.

If there are no changes to the current group sales and marketing structure and functionality, SAG believes the citywide activity will remain similar to the current levels. There is a great opportunity to increase results by maximizing all available resources.

Joint accountability

The opportunity to create joint accountability for the overall success of the Ocean Center in conjunction with increasing the overall economic impact is an important feature of the proposed new approach to group sales and marketing. The broad-based understanding and involvement in the fiscal success of the Ocean Center in conjunction with increasing room night production will improve all aspects of the Ocean Center's results.

Functionality is the key

The functionality that has been outlined above is the foundation of a successful group sales effort. The structure and organizational model can vary if the opportunity to deliver an effective groups sales and marketing effort still exists. The other important aspect is to avoid duplication between marketing agencies. The implementation of the recommended functionality will increase the overall group market share for Daytona Beach and Volusia County.

The importance of events in tourism



SAG has met with event organizers and received feedback related to events in Volusia County. There is a wide spectrum of views on the importance of events as part of the overall tourism strategy. There are many levels and types of support for the events by the advertising authorities. SAG is not aware of specific criteria that are used when determining what support will be given.

One key criterion for the determination of support is the level of outside visitation and overnight stays that will be generated by an event. It is recommended that specific criteria be established in making these determinations. Examples include:

1. Economic impact – direct spending
2. Hotel room night generation
3. Value in overall marketing as a visitor destination
4. Attendees are a valuable year round market
5. Quality of life for residents
6. Security or safety needs
7. Event management structure
8. Cost associated with event support

An effective annual plan for the support of tourism-related events is an important aspect of increasing effectiveness and overall results. The PRIZM analysis demonstrates there are specific demographics that have the highest propensity to attend events.

As stated above, there are widely differing views in the community on the larger subject of high profile special events in Volusia County, especially Bike Week, in the context of economic impact versus shaping the “image” of the area and their impact on the quality of life of residents. This study was not designed to fully analyze the impact of special events. SAG would recommend community leaders consider a separate review of the overall impact of special events on the community as a whole.

It is recommended that the marketing plans of the three authorities contain an event plan with agreed upon criteria for determining the level of involvement and support.

Sports commission

SAG had numerous conversations with stakeholders regarding the current activities in the sports market and the perceived potential. There is a dominant opinion that Volusia County is not getting its share of this important market. The types of sporting events ranged from youth sports to competitive arts to high profile amateur or professional events.



The creation by the county of the SportsVolusia.com website is a vital tool in the development of a plan to increase the number of sporting events that take place in Volusia County. According to the Florida Sports Foundation, the sporting industry has a \$36 billion impact on the state economy.

Currently, there are 22 sports commissions in Florida. Many counties have created a sports commission for the purpose of focusing resources on bringing sporting events to their county. SAG reviewed the activity generated by the sports commissions throughout the state and it appears Volusia County is not getting a commensurate share of sporting events. It is recommended that a sports commission be formed in Volusia County. This will bring the local sports experts together to support the effort of attracting new events to Volusia County.

SAG has spoken with the Florida Sports Foundation to understand the process and to ensure the newly created sports commission could apply for funding and support in pursuing future events. The Florida Sports Foundation confirmed that a sports commission in Volusia County would have access to the type of support that is provided by the state foundation.

SAG also has reviewed the current agreement and spoken with the Central Florida Sports Commission. It is recommended that the county terminate this agreement at such time that a new Volusia County sports commission has been formed. This recommendation is not based on a review of the performance of the Central Florida Sports Commission. The recommendation is based on the opportunity to engage resources and organizations within the county in a targeted effort to attract sporting events. It is recommended that the current expenditures focused on sports marketing be redirected to support a county-based sports marketing effort. It is recommended that a centralized effort is developed that brings sports leaders together throughout the county.

It is recommended that a task force is formed which would include the county's tourism advertising authorities and other organizations interested in collaborating in an effort to bring additional sporting events to Volusia County. The task force would put forward a recommended structure, proposed budget and preliminary goals to the County Council.

SAG encountered many viewpoints related to the question of branding in Volusia County. The main objective in determining a brand strategy is maximizing positive awareness of a product or destination. Volusia County is faced with the challenge of promoting multiple brands in tourism including West Volusia, Southeast Volusia and the Daytona Beach area. SAG has reviewed many aspects of the value of the Daytona brand. The focus of this review is on the value of the Daytona brand.

1. The Daytona 500 is the fourth highest revenue sporting event in the world according to Forbes Magazine.
2. It is the only event in the top five that occurs in the same location every year.
3. The Daytona name has been used in promoting many consumer products throughout the year.
4. One example is the Daytona Rolex:



- [illegible]



6. These are examples of products that have used the Daytona name:



Daytona Sofa Bed



Prestige Daytona Kettle



Daytona Deformity System



*TaylorMade Rossa Core Classic
Daytona 6 Putter*



*Optos® Daytona Ultra-Widefield
Retinal Imaging*



Keen Men's Daytona Sandals

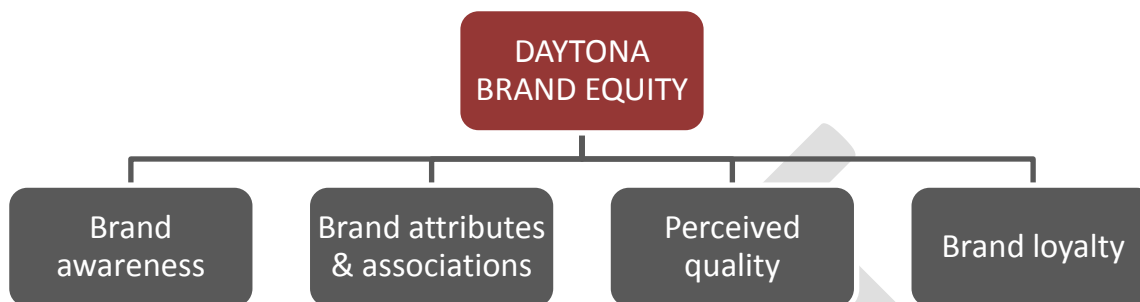


Strik Daytona Bow Tie

SAG encountered many opinions related to the leveraging of the Daytona brand. In some cases it was difficult to separate the word Daytona from the Daytona 500 or the City of Daytona Beach. In the case of the consumer products above it is clear the use of the word Daytona was a key marketing determination in naming the product. It also is interesting to note that while there are many examples where the name Daytona is associated directly with cars or a similar activity, the name has been used in many other products.

Brand equity – Daytona

The following is an overview of determining brand equity:



SAG did not complete a brand study for “Daytona”. The chart above asks the important questions in making a determination of the equity or value of a brand. The following are SAG’s observations:

1. Brand awareness

The Daytona brand is known throughout the world. SAG’s research uncovered consumer products in other countries using the Daytona brand. This, coupled with the hundreds of millions of dollars invested annual by the Daytona 500 activities, creates a significant ongoing foundation.

2. Brand attributes and associations

The Daytona brand has many positive associations. SAG encountered concern over some of the potential negative associations. One example is the association with spring break, which several stakeholders view as a negative.

3. Perceived quality

The varieties of products that have the Daytona name indicate that the Daytona brand can be effective with a broad audience. The use of the brand by the Rolex Corporation signifies its acceptance in the luxury market. The examples shown above also demonstrate its effectiveness with many different consumer markets.

4. Brand loyalty

The name Daytona has been associated with events in the early 20th century and continues to be incorporated actively into product and events today. This would indicate the success of the brand in helping position a wide variety of consumer activities.

There are numerous examples around the country where communities have recognized the value of brand identity and proximity to a well known geographic region. Nearby examples include the debate ongoing in Orange County over whether to market the entire area as Orlando. There is discussion in Broward County about going so far as changing the official name of the county to Ft. Lauderdale County because of that city's higher name recognition. A decision by the airport in Sanford to add Orlando to the airport's name has proven to be a very positive move.

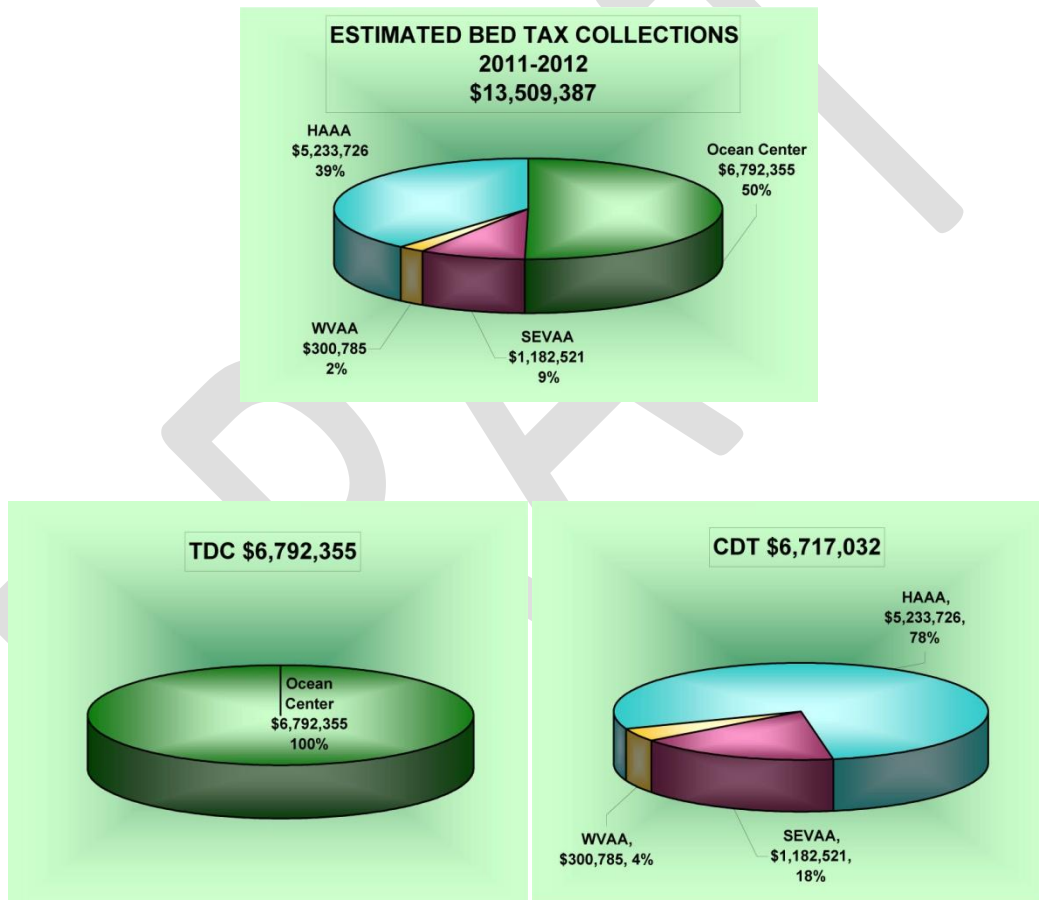
While there is regional allegiance in Volusia County to the three tourism advertising districts because of the perceived differences of character, there are strategic advantages to promoting all of Volusia County in a manner that maximizes the considerable and ongoing investment in the "Daytona" brand and its proximity to the Orlando region, the world's number one tourist destination. It is quite possible to market the distinctiveness and identities of Southeast Volusia and West Volusia in conjunction with a central brand. Promoting Southeast Volusia, and especially West Volusia, with existing advertising resources is, at best, a formidable marketing challenge and, in some ways, an opportunity may be missed by not gaining the value of a brand with significant equity.

This overview demonstrates the significant potential value of the Daytona brand to tourism as a whole. SAG recommends a thorough review be conducted of the potential opportunities to maximize the value of an internationally recognized brand within the region.

Funding – current and future

SAG investigated the funding levels in similar counties in Florida and similar destinations in an effort to create a meaningful comparison. SAG used the following ratios to determine potential opportunities. The goal was to create common benchmarks to examine how Volusia County compared in the use of available revenue.

Current allocation of the bed tax for Volusia County



The research addendum outlines the sources used to collect the data.

The following destinations and counties were studied:

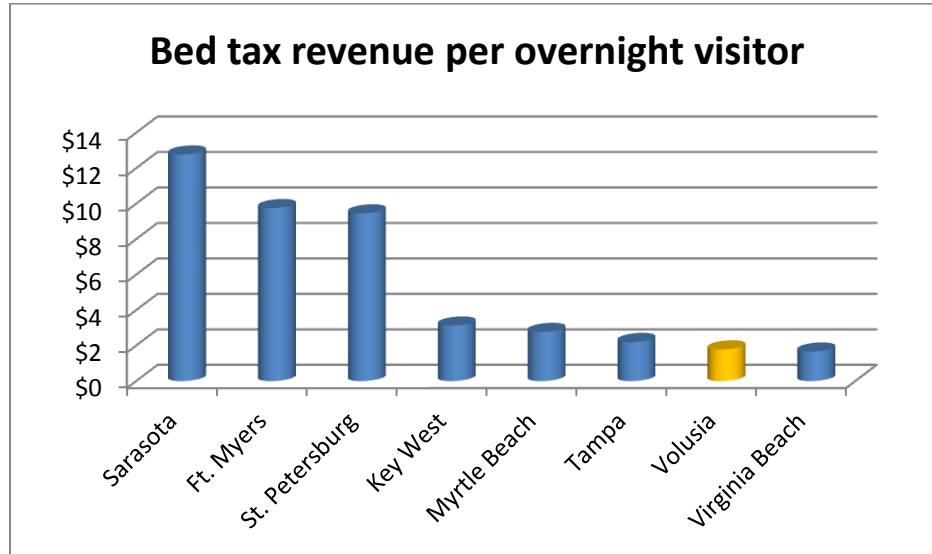
1. Ft. Myers
2. Key West
3. Virginia Beach
4. Sarasota
5. St. Petersburg
6. Tampa
7. Myrtle Beach

The following graphics highlight funding comparisons.

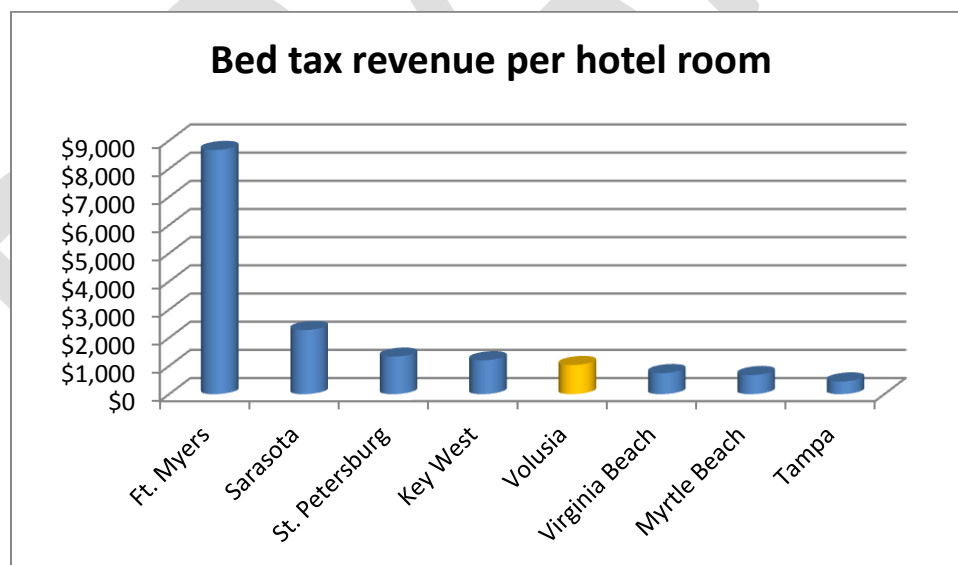
A funding opportunity

The following compares Volusia County tourism funding to seven other competitive destinations. This indicates an opportunity to evaluate future funding increases. SAG used multiple comparisons to conclude there is a need to evaluate potential sources of additional funding at some point in the future.

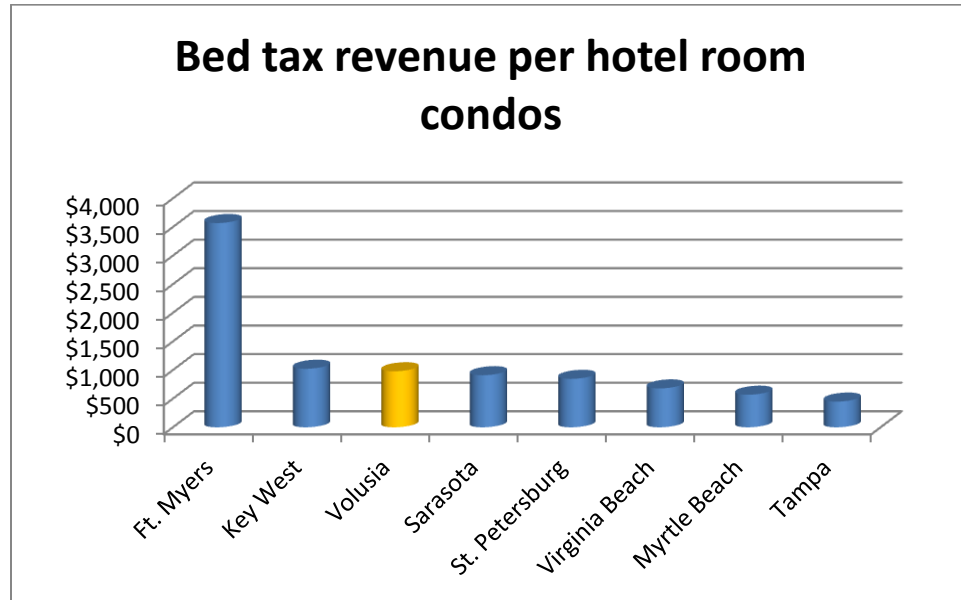
Source of Funds



This is an indicator of the availability of bed tax in relation to overnight visitors. SAG analyzed the level of overall funding available in comparison to current visitor volume. This would indicate Volusia County is on the lower end of available dollars.

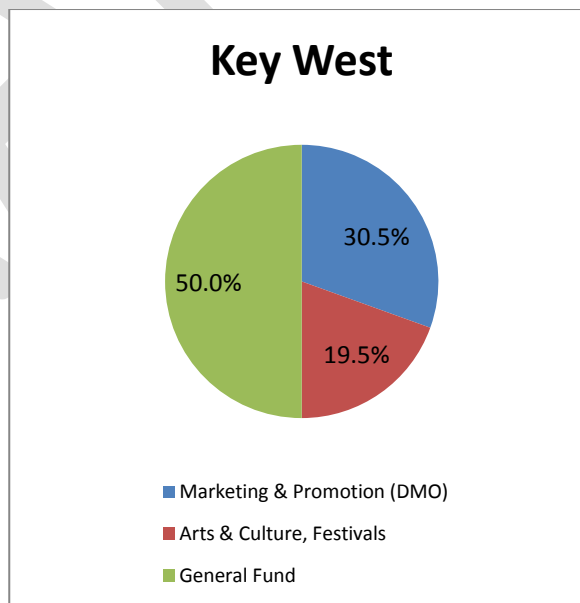
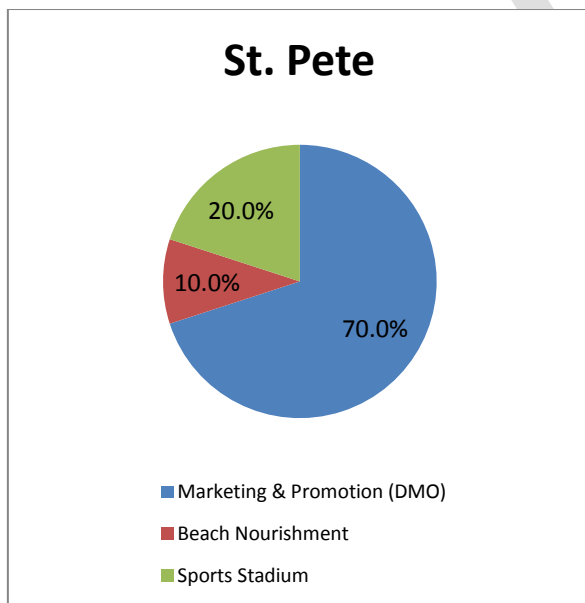
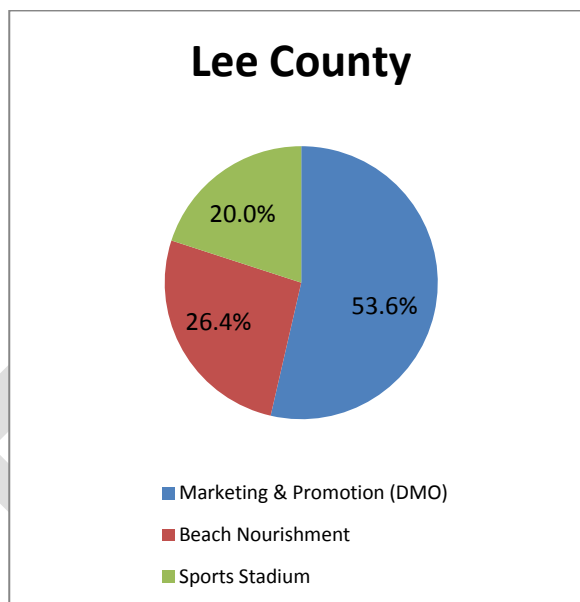
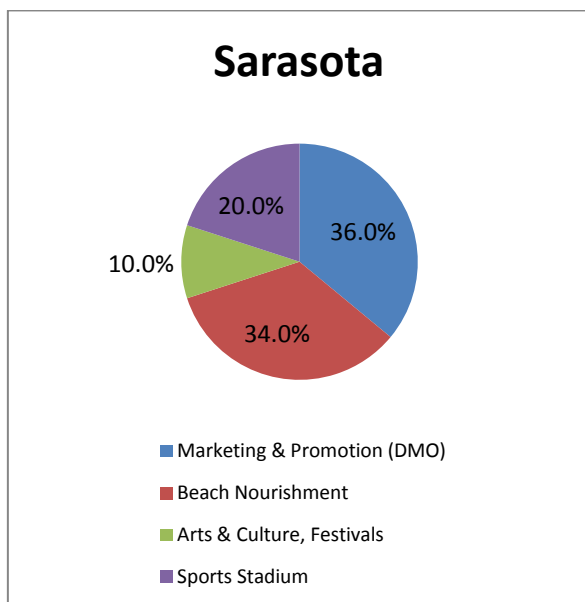


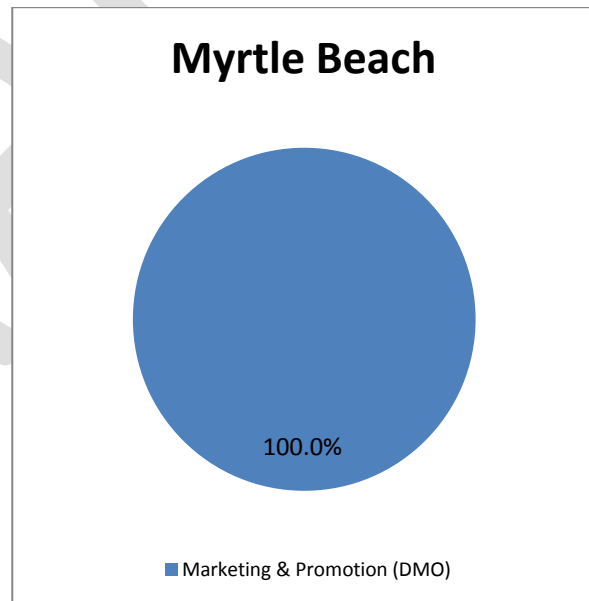
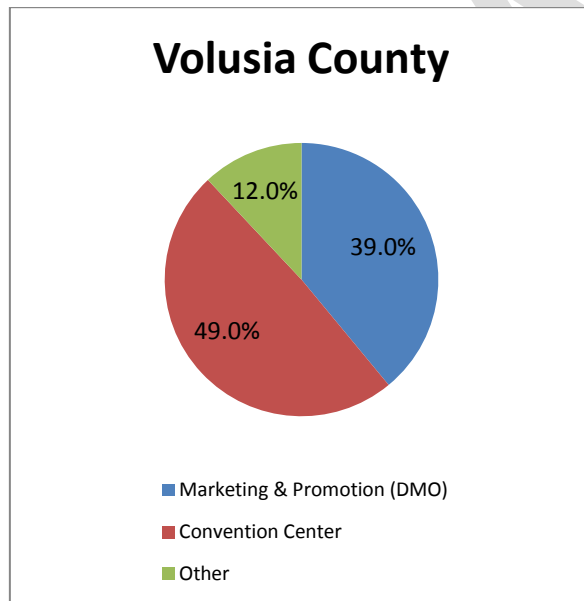
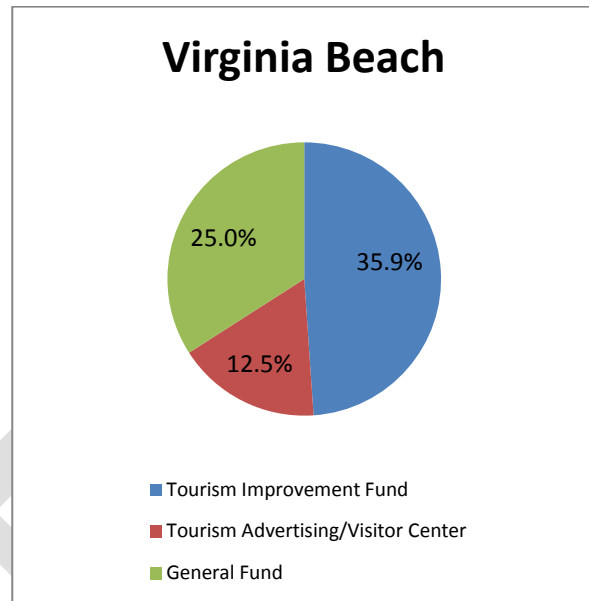
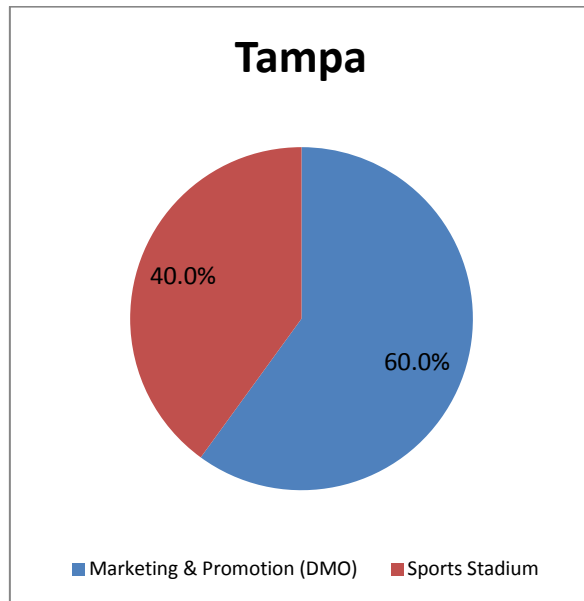
This is an indicator of available revenue per hotel room. The size of the hotel industry in Volusia County is another basis for evaluating available funding. This is an indication of the resources available to generate activity using the number of hotel rooms as a common tourism asset. The current hotel rates in Volusia County rank lower in comparison. This indicates there is a relatively large hotel inventory that generates a lower amount of tax revenue for tourism marketing.



The condominium inventory is a significant portion of overall accommodations. The comparison of funding with the combination of condominiums and hotels moves Volusia County higher in comparison to others. This also supports the need for dedicated marketing strategies to support the vacation rental industry.

SAG also analyzed the breakdown of uses of the bed tax in the counties and cities surveyed.





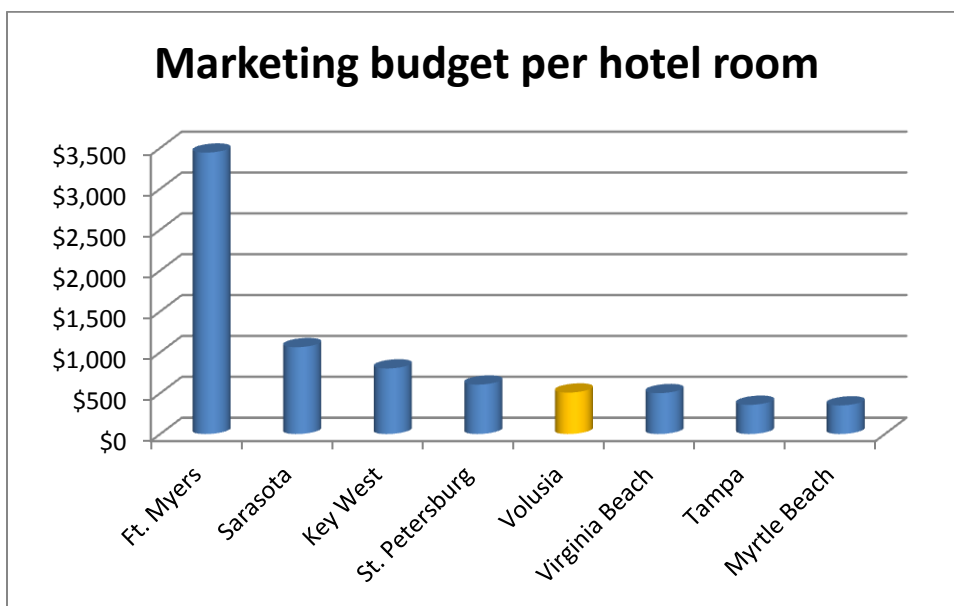
The above charts demonstrate the importance of maintaining focus on tourism marketing when distributing the bed tax. The percentage of total bed tax that is dedicated to marketing ranges from thirty to one hundred percent.

Marketing funds

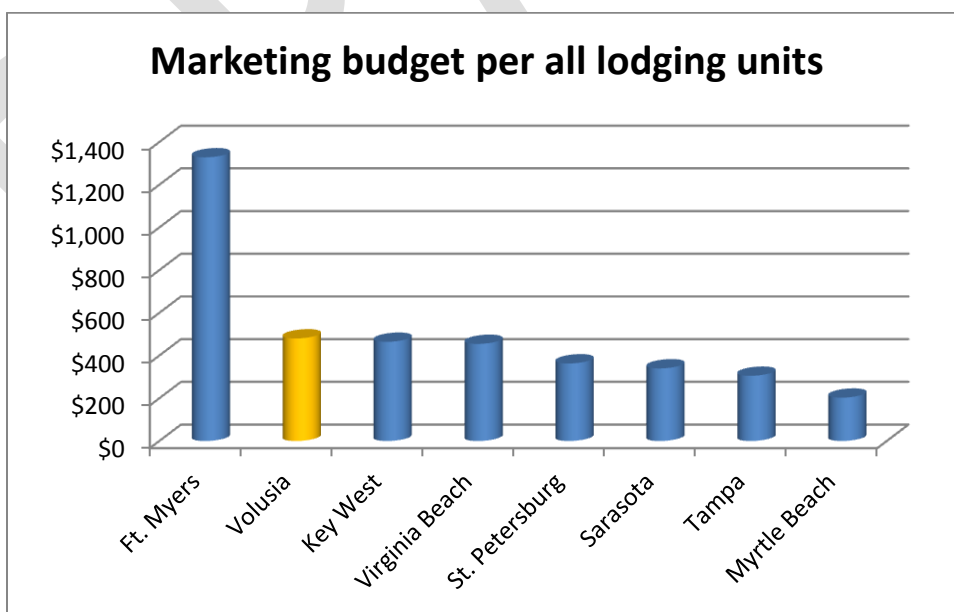
SAG also focused the funding analysis on the availability of marketing dollars in Volusia County. This is an indicator of the relative ability to penetrate the market in comparison to size. This also indicates the need to increase overall tourism marketing funds.

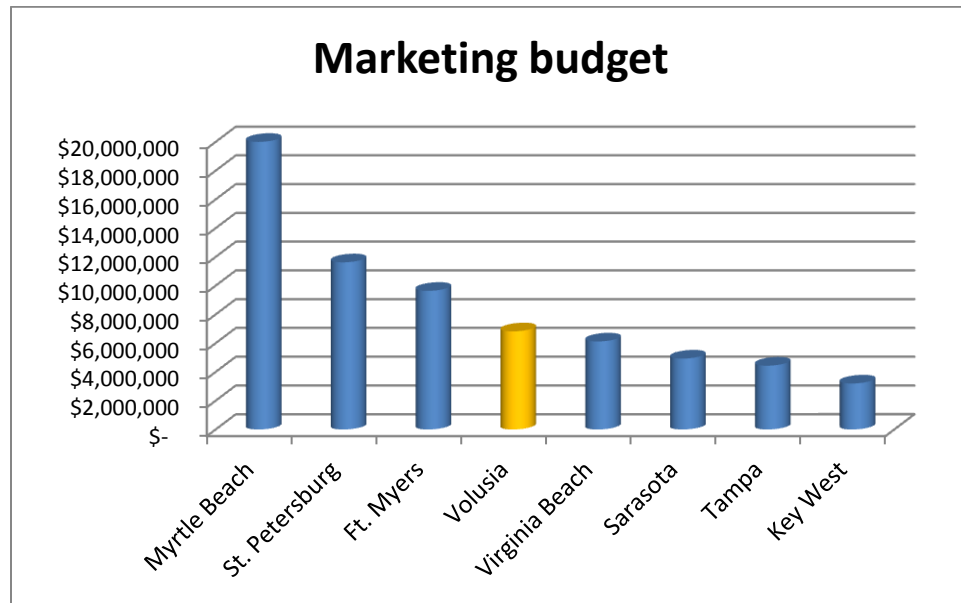


Volusia County ranked the lowest when comparing marketing budgets to overnight visitors. This is an important indicator of current and future resources to retain and grow visitors.



Using hotel rooms as a common tourism asset, this indicates that Volusia County is in the lower half of the destinations studied. The hotel room inventory demonstrates the marketing needed to support and increase overall occupancy in Volusia County.





Marketing funds – conclusion

The analysis indicates that Volusia County is funded at a level that is below comparable key competitors. The review of available marketing funds indicates an opportunity to determine alternate funding opportunities and the need to direct more overall bed tax revenue to tourism marketing. The ratio of marketing dollars to overnight visitors is an important indicator of the need to increase marketing funding.

SAG has reviewed funding options to increase future marketing resources. These include tourism business improvement districts and the inclusion of related industries in funding plans.

It is recommended that options for increased funding be reviewed for potential future implementation.

Daytona Beach/Volusia County competitive destination research methodology

All information for competitive destinations was gathered starting with the 2011 DMAI Organizational and Financial Profile Study, followed by web searches for each county/destination and augmented, as necessary, by telephone calls to the county TDC, destination convention and visitor bureau, chamber of commerce, county tax collector, airport authority, or other organization to which we were referred to collect the necessary information. When possible, information was checked against a variety of sources to verify its validity.

Detail by destination:

Ft. Myers	Information was gathered from the Lee County Visitor & Convention Bureau's website, including the "Statistics" part of the site and the 2011-2012 Sales and Marketing Plan included on the site. Our independent findings also were compared to the Lee County figures from the 2011 DMAI Organizational and Financial Profile Study for cross-checking.
Key West	Information was gathered from the Key West Chamber of Commerce website and phone calls to the Key West Chamber of Commerce to clarify and get more detail on the findings from the website. Additional information was obtained from the Monroe County website, including the Monroe County TDC's 2011 Annual Report.
Myrtle Beach	Information was obtained through the Myrtle Beach Area Convention and Visitors Bureau and Chamber of Commerce, via their websites and with direct calls and emails to their representatives to clarify/obtain information.
Sarasota	Information for Sarasota was gathered via the Visit Sarasota County website, including the county's Adopted Financial Plan: Fiscal Year 2011 - 2015.
St. Petersburg	The website for the St. Petersburg/Clearwater Area Convention & Visitors Bureau provided most of the information for this destination, particularly the reports available on the "Statistics" part of the site.
Tampa	Information for Tampa Bay primarily was obtained via the Tampa Bay & Company website, combined with information from the Hillsborough County Hotel & Motel Association and phone conversations with the county offices of Economic Development and the Tax Collector.
Virginia Beach	Much of the information for Virginia Beach came from the 2011 DMAI Organizational and Financial Profile Study and was augmented by the website of the Virginia Beach Convention & Visitors Bureau along with phone calls to the CVB staff and county offices (Treasurer and Business Licenses) to clarify certain findings.
Volusia	Findings for Volusia/Daytona Beach were obtained directly via email correspondence with the county.

Summary of recommendations

The following is a summary of recommendations and a suggested timeline for implementation or support from the Volusia County Council.

Short term – 0 to 3 months

1. Institute new directive for inclusion in the annual budget and marketing plan approval process by the Volusia County Council

- a. Research driven plan
 - i. All marketing plans will demonstrate how research drives the direction of:
 - 1. Media decisions
 - 2. Creative approaches
 - 3. Overall campaigns
 - ii. Continued refinement of targeted customers
- b. Metrics and measurement
 - i. All marketing plans will present measurable annual goals including:
 - 1. Room nights generated
 - 2. Economic impact
 - 3. Market occupancy and average daily rate
 - a. Trends
- c. Collaboration and leverage
 - i. All marketing plans will include a section with programs on collaboration and cooperative activities with:
 - 1. Tourism authorities
 - 2. Cities
 - 3. Chambers of commerce
 - 4. Industry associations
 - ii. Schedule of presentations to County Council and key partners
- d. Event plan
 - i. All marketing plans will include an event plan that includes:
 - 1. Criteria for event support
 - a. Tourism impact
 - b. Product/brand impact
 - 2. List of events to receive support
 - a. Projected impact of sponsored events

2. Creation and initial meeting of the Tourism Product Development Task Force

- a. Reach out to key community economic development leaders

3. *Approve and begin the implementation of the new group sales and marketing plan*
 - a. Creation of implementation schedule

Medium term – 3 to 6 months

1. *Implementation of new governance/nomination process*
 - a. County Council indication of support
 - b. Engagement of tourism authorities
 - c. County Attorney
 - d. Development of suggested process
2. *Completion of the implementation of the group sales and marketing plan*
3. *Implementation of the shared service model*
 - a. Creation of new agreements
4. *Implementation of the stakeholder communications plan*
 - a. Monthly tourism reports with agreed upon metrics
 - b. County Council approves new reporting requirements
5. *Development of initial plan by Tourism Product Development Task Force*
 - a. Targeted industries
 - b. Resources needed
6. *Report on new marketing direction –advertising authorities*
 - a. One-to-one direct marketing efforts
 - b. New approach to media selection
7. *Development of the Volusia County Sports Commission*
 - a. Creation of task force
 - b. Timeline to present structure and initial budget

Long term –1 to 2 years

1. *Evaluate new funding possibilities*
 - a. Review industry driven mechanism
2. *Conduct branding evaluation*
 - a. Conduct further review of Daytona brand equity
 - b. Opportunities to maximize

Conclusion – leadership and focused implementation

This report contains recommendations in a wide range of tourism areas. There is an opportunity for the County Council, business and community leaders to provide the leadership and support for the implementation of these recommendations. This collective leadership and determination will be a critical component of long term success.

It is recommended that the County Council assign an individual and or team to be held responsible for coordinating the overall implementation. This will ensure that there is ongoing focus on achieving agreed upon timelines and reporting on accomplishments and challenges. This combination of leadership and focused implementation will create an environment that will transform tourism in Volusia County.

Appendix

DRAFT

Strategic Advisory Group would like to thank the following stakeholders who have provided invaluable insight that has driven these recommendations.

- | | |
|---|--|
| <ul style="list-style-type: none"> ▪ Ken Ali, President/CEO, Daytona Aviation ▪ Gwen Azama-Edwards, President/CEO, A-E Enterprises, Inc. ▪ Sean Belgrade, Vice President of Marketing, Daytona International Speedway and Chair of HAAA ▪ Jim Berkely, General Manager, Plaza Resort & Spa ▪ Manoj Bhoola, President/COO, Elite Hospitality Hotels ▪ Kevin Bowler, Senior Manager, Daytona Beverages, LLC ▪ Tangela Boyd, In-Market Communications Manager, Daytona Beach Area Convention & Visitors Bureau ▪ Hyatt Brown, CEO, Brown and Brown Insurance ▪ Chad Brunton, Marriott Residence Inn & Courtyard ▪ Angela Cameron Daniels, Assistant Director, County of Volusia, Ocean Center ▪ Lori Campbell Baker, Daytona Beach News-Journal ▪ Adam Chappelle, Reporter, Black Crow Media, LLC – WNDB Radio ▪ Joie Chitwood, President, Daytona International Speedway ▪ Pam Clark, Benedict Advertising ▪ Beth Coleman, Advertising Executive, Daytona Beach News-Journal ▪ Tim Corder, Director of Sales & Marketing, Pyramid Hotel Group ▪ Bob Davis, CEO/President, Hotel Motel Association of Volusia County ▪ Theresa Doan, President, Doan Management ▪ Ted Doran, Chair, Halifax Area Advertising Authority, Doran Sims Wolf & Kundid Law Office ▪ Phil Dvorak, Vice-President, Daytona Beach Parasail, Inc. ▪ Matt Dvorak, President, Daytona Beach Parasail, Inc. ▪ Robert Ehrhardt, Director, County of Volusia, Aviation and Economic Resources ▪ Kim Ellis, General Manager & Marketing Director, Ocean Walk Shoppes and Movies ▪ Donna Fillion, Sales Director, Black Crow Broadcasting ▪ Evelyn Fine, President, Fine Research & Marketing, Inc., Mid-Florida Marketing & Research, Inc. ▪ Suzanne Forbes, Owner, James Moore & Co. and Member-Daytona Regional Chamber of Commerce ▪ Dan Francatti, Daytona Beach Kennel & Poker Club and HAAA Board Member ▪ Liz Grindell, Interim President/CEO, Daytona Beach Area Convention & Visitors Bureau ▪ Mayor Derek Henry, City of Daytona Beach ▪ Jeffrey Hentz, President/CEO, Daytona Beach Area Convention & Visitors Bureau ▪ Robert Hietala, VP of Hotel Operations & General Mgr., The Plaza Resort & Spa, Inner Circle Management | <ul style="list-style-type: none"> ▪ Mike Kardos, General Manager, Daytona Beach Resort & Conference Center ▪ Fredrick "Rick" Karl, Director, County of Volusia - Aviation and Economic Resources ▪ Mark Lane, Daytona Beach News-Journal ▪ Rich Larkin, Hilton Daytona Beach Resort ▪ Garry Libby, Retired MOAS Director, Museum of Arts and Sciences ▪ Rev. John Long, III, Senior Pastor, Tubman-King Community Church ▪ Julie McKinley, Account representative, Black Crow Broadcasting ▪ Larry McKinney, President/CEO, & Board Members, Daytona Regional Chamber of Commerce ▪ Linda McMahon, Marketing, Daytona Beach Area Convention & Visitors Bureau ▪ Kerry Mitruska, Director of Sales & Marketing, Plaza Resort & Spa ▪ Samir Naran, Executive Vice-President, Premiere Resorts and Management ▪ Keith Norden, President & CEO, Team Volusia Economic Development Commission ▪ Jim O'Shaughnessy, Daytona Beach Area Convention & Visitors Bureau ▪ Stanley O'Brochta, Owner, Atlantic Ocean Palm ▪ Clayton Park, Reporter, Daytona Beach News-Journal ▪ Buck Parker, President, Cimarron South Inc. ▪ Don Poor, Director, County of Volusia, Ocean Center ▪ Greg Price, Daytona Beach Area Convention & Visitors Bureau ▪ Joetta Raylots, Sr. Marketing Executive, SEE Coastal Media, LLC ▪ Pat Rice, Executive Editor, Daytona Beach News-Journal ▪ Mayor Glenn Ritchey, City of Daytona Beach ▪ Arthur Schwartz, Citizen, King at Salsa King ▪ Kent Sharples, CEO, Business Alliance ▪ Al Smith, Radio host, Black Crow Media, LLC – WNDB Radio ▪ Hardy Smith, City of Daytona Beach ▪ Warren and Ruth Trager, Business owner, Kressman ▪ Doug Vimmerstedt, County of Volusia, Aviation and Economic Resources ▪ Ron Wallace, Publisher, Daytona Beach News-Journal ▪ Tony Welch, Tony Welch Productions ▪ Jay Young, Owner, P S Printing & Marketing ▪ Gary Brown, Ad Com Chair for CVB, Sun Viking Lodge ▪ Steve Farley, El Caribe Hotel and HAAA Board Member ▪ Blaine Lansbury, Bahama House ▪ Bill Moore, Lexington Inn & Suites ▪ David Rijos, General Manager, Shores Resort and Spa |
|---|--|

- Tom Staed, Tourist Development Council, Bahama House, Staed Family Properties, Inc
- John Finger, Director of Marketing Sales, Cove on Ormond Beach
- Dwight Jessup, Photographer
- Mike Jiloty, President, Lord and Lasker/Florida, Inc.
- Phil Maroney, President, Root Company
- Mandy Rosemeyer Campbell, Bruce Rosemeyer's Destination Daytona
- Wayne Van Orden, Naarden Inc.
- Dick Neland, President, Inlet Harbor Restaurant and Marina
- Mary Beth Austin, Ocean Properties & Management
- Christopher and Elizabeth "Liz" Bell
- Judy Cole, Spa at Riverview
- Kelley DeSoto, Marketing Broker-Associate, SVAA Board Member, Ocean Properties & Management
- Skip Diegel, President, WSBB Radio
- Melanie Emanuel, President & Board Members, Southeast Volusia Chamber of Commerce
- Mike Funaro, President, Small Pond Media, and SEV Chamber
- Tim Hamby, Executive Director, Southeast Volusia Advertising Authority, New Smyrna Beach Visitors Center
- David Kosmas, SVAA Board Member, Collado Real Estate Management
- Lorna Maniscalco, Dolphin View Seafood Restaurant
- George Richford, Owner/SVAA member, Pastime Princess
- Bill and Margy Roe, Ocean Properties & Management
- Debora Schmeltz, President-Elect, Southeast Volusia Chamber of Commerce
- Kathy Standing, SVAA Board Member, Buena Vista Inn, New Smyrna Beach Visitors Center
- Terri Vyse, Holiday Inn Hotel & Suites
- Richard Vyse, Manager, Holiday Inn Hotel & Suites
- Ruth Schiffermiller, SVAA Board Member, Osteen Diner
- Tom Clapsaddle, SVAA Board Member, 5802 Journeys End Way
- Debbie Connors, Exec. Director & Board Members, Chamber of Commerce Port Orange, & South Daytona Chamber of Commerce
- Jerry Kenney, President, Kenney Broadcasting Corp.
- Jeff Paglialonga, Great Ocean Condos
- Sharon Hughes, General Manager, Tourist Development Council, Hampton Inn
- Joie Alexander, County Council Member, 2012, County of Volusia
- Tanner Andrews, Columnist, West Volusia Beacon
- Pat Andrews, Reporter, West Volusia Beacon
- Board members, West Volusia Tourism Advertising Authority
- Frank Bruno, County Council Chair 2012, Tourist Development Council Chair, County of Volusia
- Tim Bustos, Executive Director, Florida Bicycle Association
- Dave Byron, Director, County of Volusia, Community Services/Comm. Information
- Michelle Coats, Marketing Specialist, County of Volusia, Community Information, Administration, Southeast Volusia Advertising Authority
- Nick Conte, Exec. Director & Board Members, DeLand Area Chamber of Commerce
- Jeff Crumbley, Digital Photography Specialist, County of Volusia - Community Information
- Joyce Cusack, County Council Member, At-Large, County of Volusia
- Doug Daniels, County Council Member, District 4, County of Volusia
- Jason Davis, County Council Chair 2013, County of Volusia
- Dona DeMarsh Butler, Director, County of Volusia, Community Assistance, Administration, Southeast Volusia Advertising Authority
- Deborah Denys, County Council Member, District 3, County of Volusia
- James Dinneen, County Manager, County of Volusia
- Thom Giordano, Marketing Director, Volusia County Fair
- Mary Beth Harris, Executive Director, MainStreet DeLand
- Herb Hiller
- Mike Johnson, Skydive DeLand
- Andy Kelly, County Council Member, 2012, County of Volusia
- Pat Kuehn, Marketing Specialist, County of Volusia - Community Information
- Joanne Magley, Sr. Marketing Specialist, County of Volusia - Community Information
- Marcia Naber, County of Volusia - Public Works Division
- Pat Northey, County Council Member, District 5, County of Volusia
- William O'Connor, Director, Continuing Education, Stetson University
- Pat Patterson, County Council Member, District 1, County of Volusia
- Carl Persis, County Council Member, 2012, County of Volusia
- Rick Rawlins, Highland Park Fish Camp
- George Recktenwald, Director, County of Volusia - Public Works Division
- Debbie Somerford, Administrative Aide, County of Volusia - County Manager Office
- Jenny Stumbras, Director & Board Members, DeLand Area Chamber of Commerce
- Renee Tallevast, Executive Director, West Volusia Tourism Advertising Authority
- Josh Wagner, County Council Member, District 2, County of Volusia
- Eugene Gizzi, Chair, ECHO Board
- Ron Woxberg, Owner/operator, St. Johns River Cruises

